



Business Solutions

User Manual
xRM1 HR Management

English



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0 Before you start

0.1 Foreword

"**xRM1 HR Management**" is the Business Solution for recruiting, managing and developing company employees, including Employee Services, in Microsoft Dynamics.

It includes functions for Candidate Management, Onboarding, Organizational Charts, Absence Management, Skill and Performance Management, as well as Scorecards. Employee Services for Time Entry, Request for Leave and Expenses & Travel Management are also included.

We recommend that the reader of this manual has basic knowledge of project management and is proficient in working with Microsoft Dynamics.

If you don't meet these requirements, we recommend that you familiarize yourself with these topics beforehand, as this will help you work more efficiently and sensibly with "**xRM1 HR Management**".

Note: "**xRM1 HR Management**" is built upon all Microsoft standards, particularly in regards to forms, views and rights and roles. Should you find that information, elements or functions are not as they appear in the document, please ensure that the user you are using has the required rights and that the required basic settings are in the system.

As many HR executives use Microsoft Outlook in order to manage their staff and the several HR functions, the description of the functions in this manual is based on Microsoft Outlook wherever applicable.

0.2 System requirements

In order to use "**xRM1 HR Management**", several system requirements must be in place. They can be found in the "Getting started guide" on our website <http://www.xRM1.com>.



1 Terminology

The following selected terms are found within „**xRM1 HR Management**“. Here you will find them defined in more depth, for further clarification.

1.1 Costs

Costs define the monetary expenditure the project creates within your organization. These are only internal costs, in different forms (from personnel-related expenditure, material usage, travel, etc.)

1.2 Full Time Equivalent

A full time equivalent, sometimes abbreviated as FTE, is a unit to measure employed people in a way that makes them comparable although they may work a different number of hours per week.

The unit is obtained by comparing an employee's average number of hours worked to the average number of hours of a full time worker.

A full time person is therefore counted as one FTE, while a part-time worker gets a score in proportion to the hours he or she works. For example, a part-time worker employed for 20 hours a week where full time work consists of 40 hours, is counted as 0.5 FTE.

1.3 Business Closure

The business closure defines the days in which vacation is mandatory for the whole company. Thus, an employee's remaining days of leave are reduced automatically for business closure days. Business Closures are standardized for all employees.

1.4 Absence

Absence includes all types of vacation/leave with remaining days of leave.

1.5 Public Holiday

Public holidays can be standardized for all employees. Here, leave is not subtracted.

1.6 New Annual Leave

New annual leave for the upcoming year can be entered individually for each employee.

1.7 Remaining days of leave (expired)

If an employee has not taken all of his/her allotted vacation by the end of a business year, the company can decide that remaining days of leave will expire.



2 System administration settings

2.1 Absence Administration

The screenshot shows the 'Absence Administration' page. At the top, there's a navigation bar with icons for Help, Employee Cockpit, Fast Time Entry, and Projects. Below the navigation is a 'Create' button. The main area is titled 'Type' and contains a dropdown menu for 'Absence Reason'. The dropdown list includes: Business Closure, Absence, Sick leave, Public Holiday, New Annual Leave, and Remaining days of leave (expired). To the left of the dropdown, there's a section labeled 'Times'.

In the main "**Settings**" menu, the "**Extensions**" section displays a function "**Absence Administration**" which is specific to "**xRM1 HR Management**".

Absence Administration is an extension of "**Requests for Leave**" and completes the employee absence administration process. Illness, public holidays and business closures can all be managed centrally here by the HR department. The role "**xRM1 HR Manager**" is required for access to this area.

2.1.1 Business Closure

The "**Business Closure**" status allows business closures to be created. For all users, the relevant number of vacation days is subtracted from the remaining holiday, and a business closure is generated in the work time calendar of Microsoft Dynamics.

2.1.2 Absence

Absence is used to flag an employee as "not available" for a certain period of time, due to illness or other reasons. The number of remaining vacation days for this employee is not changed.

2.1.3 Sick leave

Sick leave is a special characteristic of an absence. An employee's absence caused by sickness or illness is entered here. The functionality of a "**Sick leave**" is equal to an "**Absence**".

2.1.4 Public holidays

Selecting "**Public holiday**" adds an absence for all relevant employees for the date selected. Unlike selecting business closure, there is no change to the number of remaining vacation days.

2.1.5 New annual holiday

New annual holiday is available to enter new annual holiday for all employees. The system takes the "**Annual holiday**" value for every employee, stores it for every user in the user entity, and adds any available holiday remaining.

2.1.6 Remaining days of vacation (expired)

Remaining days of vacation (expired) is used for every employee individually, to deduct unused vacation from the vacation days allotted. This process must be done by the HR department for every employee. The function automatically reduces the remaining vacation days for that user.

2.2 „Bing Maps“ Integration

In order to use "**Bing Maps**" integrations (e.g. in the "**Employee**" or "**Applicant**" form), please assure that "**Enable Bing Maps**" is set to "**Yes**" under "**Settings**" --> "**Administration**" --> "**System settings**" --> **Tab „General“**".



System Settings

Set system-level settings for Microsoft Dynamics CRM.

General Calendar Formats Auditing Email Marketing Customization Outlook Reporting Goals

Select the default save option for forms

Enable auto save on all forms Yes No

Set the IM presence option

Enable presence for the system Yes No

Set the full-name format

Name Format

Set the currency precision that is used for pricing throughout the system

Pricing Decimal Precision

Set whether reassigned records are shared with the original owner

Share reassigned records with original owner Yes No

Set blocked file extensions for attachments

Set the currency display option

Display currencies by using

Set up Quick Find

Enable Quick Find record limits Yes No

Select entities for search on CRM for tablets

Enable Bing Maps

Show Bing Maps on forms Yes No

Please enter Bing Maps key

Set the default country/region code

Enable country/region code prefixing Country/Region Code Prefix

Set the telephony provider

Select provider for Click to call

Skype Lync

Set whether users see CRM for tablets message

Users see app download message Yes No

OK

Cancel



3 Using xRM1 HR Management via Microsoft Outlook

Many HR managers prefer using Microsoft Outlook to organize and develop the staff they are responsible for. Therefore, the usage of the "**xRM1 HR Management**" functions will be described from a Microsoft Outlook point of view.

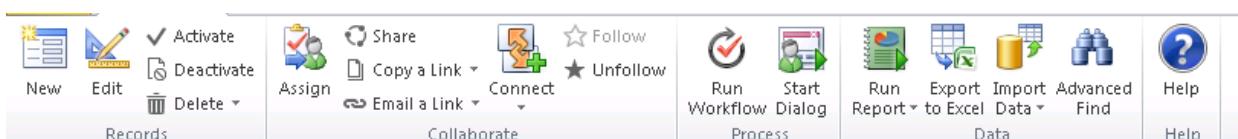
In order to use a function in Outlook, click on the desired function on the right hand site. The start screen of the function shows a respective view and a preview of the selected record.

The screenshot shows the Microsoft Outlook interface with the "xRM1 HR Management" ribbon selected. The ribbon tabs include Applications, View, Charts, Add, and Customize. Under the Applications tab, the "Records" section is active, displaying icons for New, Edit, Activate, Deactivate, Delete, Assign, Copy a Link, Email a Link, Connect, Collaborate, Run Workflow Dialog, Start Report, Run Advanced Find, Export to Excel, Import Data, and Help. The main pane displays a list of "Active Applications" under the "Applicant" category, showing three entries: Catherine McGrath (Account Manager - Honag US Consulting - 05/05/2011), David Day (Junior Consultant - Honag US Consulting - 04/26/2011), and Jonathan Hall (Senior Consultant - Honag US Consulting - 05/04/2011). Below this is a detailed view of Catherine McGrath's record, including sections for General, Related Activities, and Notes. The "General" section shows details like Desired Wage (\$42,000.00), Received On (5/10/2011), and Status Reason (Contract Negotiation). The "Related Activities" section lists several tasks and emails. The "Notes" section contains a file attachment and a note about a telephone interview. The right side of the screen shows the Outlook calendar for June 2011, with specific events for "HR Planning for Rest of the Year" scheduled for 10:30 AM - 3:00 PM on June 1st and 2nd in New York.

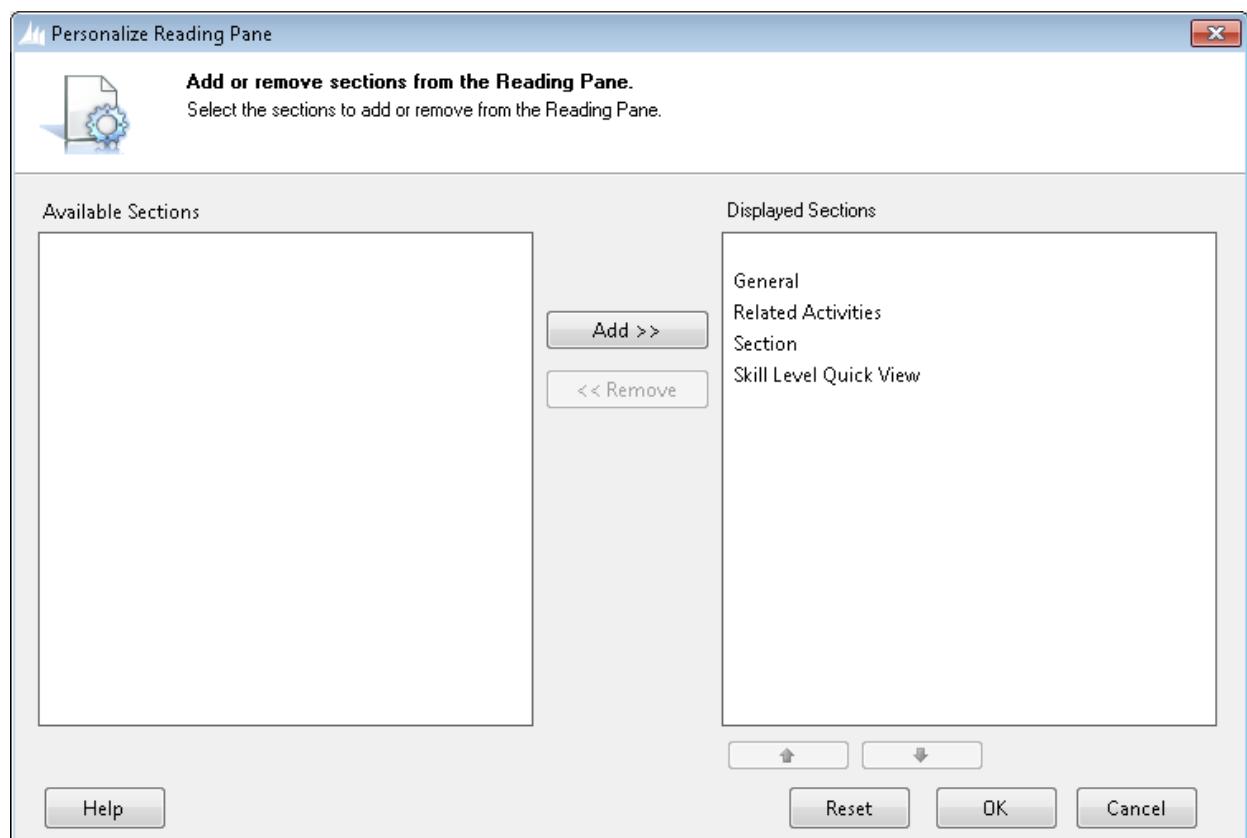
The displayed sections of the record can be moved by drag and drop.

The layout can be changed by clicking on "**View**" and then on the respective button in the "**Layout section**", e.g. "**Navigation Pane**".

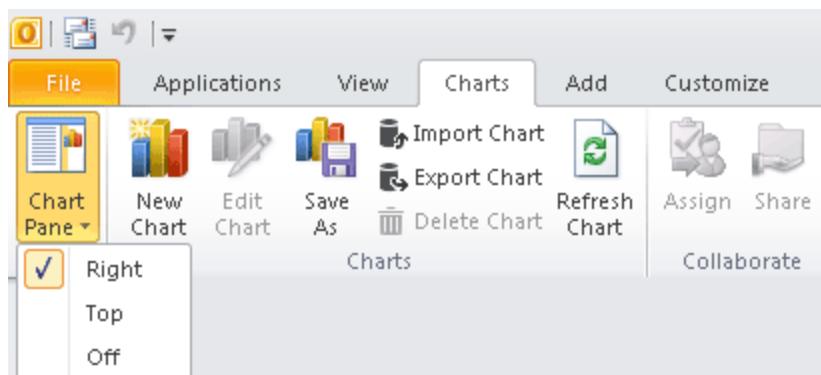
As known from Microsoft Dynamics, the user may create new records and edit, activate, deactivate, delete, assign or share it. Other functionalities from Microsoft Dynamics such as running workflows or reports may be used as well in Outlook.



The preview of each function can be easily adapted by clicking on "**View**" and the "**Customize reading pane**". Here, you can select the displayed sections.



A chart pane can be added by clicking on "**Charts**" and then on "**Chart Pane**". Here the chart corresponding to the selected view is displayed.



In Microsoft Outlook, you can also decide which view is displayed for which function. Views can be tabbed easily.

1. Open the desired view in a tab by clicking the tab to the right of the active tab, and select the view.
2. Click the push pin and it will turn vertical.
3. The new view is now "pinned".



4 xRM1 HR Management Functions

The xRM1 HR Management functions are classified under the following categories:

- **"Recruiting"**
- **"Organization"**
- **"Development"**
- **"Employee Services"**

These categories will be explained in more detail in the upcoming chapters. You will find a detailed description of every field important to a respective function.

Typically, the **"Recruiting"**, **"Organization"** and **"Development"** sections are used by HR managers or HR supervisors. The **"Employee Services"**, on the other hand, can be used by every staff member.

4.1 Employee Recruiting

In the **"Recruiting"** section, all applications can be filed, filtered and sorted according to individual requirements.

Submit open job requirements, which may be based on specific job profiles, and match applications to open placements. Links to vacancies can be published internally, or to external job markets.

Create standardized job profiles with requirements which can be matched to applicant profiles.

Add applicants and organize them with the standard Microsoft Dynamics **"Contact"** form. **"xRM1 HR Management"** is fully integrated; thus, all other Microsoft Dynamics functionalities are accessible and every applicant can easily be converted to an employee, once the application process is complete. You can see the relation between candidates and their various applications.

4.1.1 Job Profiles

As default chart, **"Job Profiles by level"** is displayed in the Outlook start screen of this entity. A pie chart shows how many job profiles call a certain level.



4.1.1.1 Main form

The screenshot shows the xRM1 HR Management application interface. At the top, there is a navigation bar with icons for search, home, and user profile (Hailey Miller Honag). The main menu includes HUMAN RESOURCES, Job Profiles, and Account Manager. Below the menu, there are buttons for back, forward, and search.

The main content area displays the "JOB PROFILE : INFORMATION" for a job profile named "Account Manager". The "General" section contains the following details:

Name	Account Manager	Business Unit	Honag US Consulting
Job Level	Team Lead	Work Hours per Week	45.00
Status Reason	In use		
Description	Manager for all accounts in his area		

The "Skill Levels" section shows a sub-grid of skills associated with the job profile:

Skill ↑	Type (Skill)	Employee	Job Profile	Required
English	Language Skill		Account Manager	4
Sales	Professional Skill		Account Manager	5

Below the grid, the status is set to "Active".

"Name": Here, you give the job profile a name.

"Business Unit": The respective business unit or department can be chosen here.

"Job Level": The user can select a certain job level for this position. Here, he/she can choose between

- **"Entry Level"**,
- **"Team Lead"**
- **"Management"** and
- **"Upper Management"**.

"Work Hours per Week": The amount of hours per week for this position is entered here.

"Status Reason": The user can decide if the job profile is a

- **"Draft"** or
- **"In use"**.

"Description": The user can describe the job profile in more detail here.

"Skill Levels": In this sub-grid, you will find the skill levels corresponding to this job profile.

"Open Placements": In this sub-grid, corresponding open placements can be found.

4.1.1.2 Form "Skill Level"

As **"Skill Level"** is a separate entity, please see chapter 4.3.5 for details.

4.1.1.3 Form "Open Placement"

As **"Open Placement"** is a separate entity, please see chapter 4.1.2 for details.



4.1.2 Open Placements

The screenshot shows the Dynamics CRM interface for the 'Open Placements' entity. The top navigation bar includes 'File', 'Open Placements', 'View', 'Charts', 'Add', 'Customize', and various action buttons like 'New', 'Edit', 'Delete', 'Assign', 'Share', 'Follow', 'Copy a Link', 'Email a Link', 'Connect', 'Run Workflow Dialog', 'Start Process', 'Run Report', 'Export to Excel', 'Import Data', 'Advanced Find', and 'Help'. The left sidebar has a tree view under 'Dynamics HR' with categories like 'Workplace', 'Sales', 'Marketing', 'Projects', 'Human Resources', 'My Work', 'Recruiting', 'Job Profiles', 'Open Placements', 'Recruiting Channels', 'Applications', 'Applicants', 'Organization', 'Development', 'Employee Services', 'Ideas', 'Service', and 'Settings'. The main content area displays 'Active Open Placements' with a search bar and filter. A table lists job profiles: Senior Consultant (1 Honag US Consulting), Junior Consultant (2 Honag US Consulting), and Account Manager (1 Honag US Consulting). To the right is a chart titled 'Open Placements by Business Unit' showing a single bar for Honag US Consulting with a value of 4. Below the chart is a message: 'Click on the chart to perform Drill Down'. At the bottom, a section for 'Senior Consultant - Honag US Consulting - 05/04/2011' shows details like Job Profile (Senior Consultant), HR Representative (Hailey Miller), Business Unit (Honag US Consulting), Status Reason (Recruiting process), and Publishing information (Type: External, Company Name: HR Recruiting Age..., Open Placement: Senior Consultant - Honag U...).

As default chart, "**Open Placements by Business Unit**" is displayed in the Outlook start screen of this entity. A bar chart shows how many open placements exist in which business unit.



4.1.2.1 Main form

Microsoft Dynamics CRM | HUMAN RESOURCES | Open Placements | Senior Consultant ... |

+ NEW | DEACTIVATE | DELETE | ASSIGN | SHARE | ...

OPEN PLACEMENT : INFORMATION
Senior Consultant - Honag US Consulting - 05/04/2011

Open Placement Received (Active) > Waiting For Applications > Recruiting Process > POST-Processing > Next Stage

✓ Job Profile * ✓ Business Unit ✓ Quantity *	Senior Consultant Honag US Consulting 1	✓ Publishing Type ✓ Costs ✓ Status Reason *	External \$350.00 Recruiting process
--	---	---	--

General

Details

Job Profile	Senior Consultant	Quantity	1
HR Representative	Hailey Miller	Requested by	Ethan Carter
Business Unit	Honag US Consulting	Requested on	5/2/2011
Status Reason	Recruiting process		

Applicants

Automatic | Bird's eye |

World • United States

Status Active

"Job Profile": The user can select the job profile which the open placement is based on here.

"Quantity": Enter how many identical vacancies are open at present.

"HR Representative": The HR manager who is in charge of the open placement is selected here.

"Requested by": The person who requested the vacancy.

"Business Unit": The respective business unit or department where the open placement is located in can be chosen here.

"Requested on": The date when the open placement was requested.

"Status Reason": The user can select a status reason for the open placement. Here, he/she can choose between

- **"Waiting for authorization"**,
- **"Waiting for applicants"** and
- **"Recruiting process"**.

"Publishing Type": Here you can select how the open placement is published. The user may choose between

- **"Internal"**,
- **"External"** or
- **"Internal & External"**.

"Listed on": The day on which the open placement was published.

"Costs": Here, the user may enter the amount of costs corresponding to a specific open placement.

"Currency": The currency of the placement costs can be selected here.

"Recruiting Channels": In the following sub-grid, you can choose where open placements are published.

"Active Applicants": This sub-grid shows active applicants for the specific open placement.

"Inactive Applicants": Here, inactive applicants concerning an open placement are displayed.

In addition, a "Bing" map shows you the places where the applicants for the specific open placement are located.

4.1.2.2 Form "Recruiting Channel"

As **"Recruiting Channel"** is a separate entity, please see chapter 4.1.3 for details.



4.1.2.3 Form "Applicants"

As "**Applicant**" is a separate entity, please see chapter 4.1.5 for details.

4.1.2.4 Business Process Flow

OPEN PLACEMENT : INFORMATION

Senior Consultant - Honag US Consulting - 05/04/2011



A default business process flow for open placements was created. It includes the following stages and fields:

"Open Placement Received":

- "Job Profile",
- "Business Unit",
- "Quantity",
- "Publishing Type",
- "Costs" and
- "Status Reason".

"Waiting for Applications":

- "Status Reason".

"Recruiting Process":

- "Status Reason".

"Post-Processing":

- "All positions filled".

Note: Fields can be added specifically just to the process flow. In addition, they can be on the form as well as on the process flow. If this is the case, entering or changing data in a field will apply for the form and the process flow.



4.1.3 Recruiting Channels

The screenshot shows the Microsoft Dynamics CRM interface for the "Recruiting Channels" module. The top navigation bar includes "File", "Recruiting Channels", "View", "Charts", "Add", and "Customize". Below the navigation is a toolbar with icons for New, Edit, Activate, Deactivate, Delete, Share, Follow, Assign, Copy a Link, Email a Link, Run Workflow, Start Dialog, Run Report, Export to Excel, Import Data, Advanced Find, and Help.

The left sidebar contains a tree view of the "Dynamics HR" navigation, with "Recruiting Channels" selected under "Job Profiles". Other sections include "Inbox", "Sent Items", "Deleted Items", "Junk E-Mail", "Outbox", "RSS Feeds", and "Search Folders".

The main content area displays a grid titled "Active Recruiting Channels" with columns: Company Name, Open Placement, Listed on, Listed until, and Publishing Type. The grid shows three entries for "HR Recruiting Agency".

Below the grid, a section titled "Internal - HR Recruiting Agency - Senior Consultant - Honag US Consulting - 05/04/2011 - 05/04/2011..." is expanded, showing "General" and "Notes" sections. The "General" section contains fields for Company Name (HR Recruiting Agency), Open Placement (Senior Consultant - Honag US Consulting - 05/04/2011), Publishing Type (Internal), Costs (\$350.00), Publication Site (<http://www.hrrecruitingagency.com/honag/seniorconsultant>), Currency (US Dollar), Listed on (5/4/2011), Owner (Hailey Miller), Listed until (7/31/2011), and Status Reason (In use).

RECRUITING CHANNEL : INFORMATION

Internal - HR Recruiting Agency - Senior Consultant - Honag US Consulting...

General

Company Name	HR Recruiting Agency	Publishing Type	Internal
Open Placement	Senior Consultant - Honag US Consulting - 05/04/2011	Costs	\$350.00
Publication Site	http://www.hrrecruitingagency.com/honag/seniorconsultant	Currency	US Dollar
Listed on	5/4/2011	Owner*	Hailey Miller
Listed until	7/31/2011	Status Reason	In use

"Company Name": With this look-up field, the user may select an "**Account**" which is the recruiting channel for the respective open placement.

"Publishing Type": Here, you can select how the open placement is published. The user may choose between

- **"Internal"** or
- **"External"**.

"Open Placement": The respective open placement for the recruiting channel can be selected here.

"Costs": Here, the user may enter the amount of costs corresponding to a specific open placement of this recruiting channel.

"Currency": The currency of the placement costs for this recruiting channel can be chosen here.

"Publication Site": Enter the link of the page where the recruiting channel has posted the open placement.

"Listed on": The day on which the open placement was published by this recruiting channel.

"Listed until": The day until which the open placement is published by this recruiting channel.

"Owner": Owner of the record.

"Status Reason": The user can decide if the job profile is

- **"In use"** or in the



- **"Recruiting Channel Pool".**

4.1.4 Applications

The screenshot shows the Dynamics HR application interface. The top navigation bar includes File, Applications, View, Charts, Add, and Customize. Below the navigation bar is a toolbar with various icons for New, Edit, Delete, Share, Copy a Link, Assign, Connect, Follow, Unfollow, Run Workflow, Start Dialog, Run Report, Export to Excel, Import Data, Advanced Find, and Help.

The left sidebar menu under 'Dynamics HR' includes Workplace, Sales, Marketing, Projects, Human Resources, My Work, Recruiting, Job Profiles, Open Placements, Recruiting Channels, Applications, Applicants, Organization, Development, Employee Services, Ideas, Service, and Settings. The 'Applications' item is currently selected.

The main content area displays the 'Active Applications' grid. The grid has columns for Applicant, Open Placement, and Received. The data shows:

Applicant	Open Placement	Received
Catherine McGrath	Account Manager - Honag US Consulting - 05/05/2011	5/10/2011
David Day	Junior Consultant - Honag US Consulting - 04/26/2011	5/4/2011
Harry Chang	Junior Consultant - Honag US Consulting - 04/26/2011	5/13/2011
Jonathan Hall	Senior Consultant - Honag US Consulting - 05/04/2011	5/23/2011

To the right of the grid is a chart titled 'Applications and Open Pl...'. The chart is a column chart showing the count of applications for different job profiles across open placements. The legend indicates that yellow bars represent 'Sum (Quantity/Open Placement)' and green bars represent 'CountAll (Application)'. The data is as follows:

Job Profile	Sum (Quantity/Open Placement)	CountAll (Application)
Account Manager	4	2
Junior Consultant	1	1
Senior Consultant	1	1

Below the chart is a note: 'Click on the chart to perform Drill Down'.

The bottom section shows details for Catherine McGrath: Open Placement (Account Manager - Honag US Consulting - 05/05/2011), Aptitude (good match), and Desired Wage (\$42,000.00). The page footer indicates '1 - 4 of 4' and 'Page 1'.

As default chart, "**Applications and Open Placements**" is displayed in the Outlook start screen of this entity. A column chart shows how many applications belong to how many open placements.



4.1.4.1 Main form

Screenshot of the xRM1 HR Management application main form for Catherine McGrath.

The top navigation bar includes: HUMAN RESOURCES, Applications, Catherine McGrath..., + NEW, DEACTIVATE, DELETE, ASSIGN, SHARE, and a user dropdown for Hailey Miller.

The title bar displays: APPLICATION : INFORMATION, Catherine McGrath - Account Manager - Honag US Consulting - 0...

The main content area shows a process flow: Application Received (Active) > First Validation > Interview Phase > Contract Negotiation > Next Stage.

Fields in the Application Received stage:

✓ Applicant *	Catherine McGrath	✓ Earliest Start Date	6/1/2011
✓ Open Placement *	Account Manager - Honag US Consulting - 05/05/2011	✓ Status Reason *	Contract Negotiation
✓ Received On	5/10/2011		

General section details:

Applicant	Catherine McGrath	Open Placement	Account Manager - Honag US Consulting - 05/05/2011
Desired Wage	\$42,000.00	Currency	US Dollar
Received On	5/10/2011	Status Reason	Contract Negotiation
Received Via	External - HR Recruiting Agency - Account Manager - Honag US Consulting - 05/05/2011	Aptitude	good match
Earliest Start Date	6/1/2011		
Remarks HR	--		

Related Activities grid:

Subject	Regarding	Activity Type	Activity Status	Owner	Priority	Start Date	Due Date
Employment Contract - Cath...	Catherine...	Email	Completed	Hailey Miller	Normal		
RE: Employment Contract - C...	Catherine...	Email	Completed	Hailey Miller	Normal		
Application for Account Man...	Catherine...	Email	Completed	Hailey Miller	Normal		
Check application	Catherine...	Task	Completed	Ethan Carter	Normal	5/12/2011 8:00 AM	5/12/2011 8:00 AM

Status filter: Active

"Applicant": The person who has submitted an application can be selected in this look-up field.

"Open Placement": Here, applications can be connected to the applicable open placement/vacancy.

"Desired Wage": The wage which the applicant desires to receive.

"Currency": Currency of the desired wage.

"Received On": The date when the application was received.

"Received Via": The recruiting channel from the application was received can be selected.

"Status Reason": The user can select a status reason for each application. Here, he/she can choose between

- **"Received"**,
- **"First Validation"**,
- **"Invited for 1st interview"**,
- **"Invited for 2nd interview"** and
- **"Contract Negotiation"**.

"Aptitude": The HR representative may give a first estimate of the applicant's aptitude. He/she may select between

- **"good match"**,
- **"average match"** and
- **"poor match"**.

"Earliest Start Date": Enter the date from which the applicant can start working here.

"Remarks HR": Any comments or reasons, e.g. for the chosen **"Status Reason"** can be entered here.

"Related Activities": All activities which are assigned to this application are shown in this sub-grid.

"Skill Level Quick View": In this sub-grid, a matching between the skill levels necessary for the open placement and those of the applicant is shown.

In order to see the skill levels, the user needs to press the **"Prepare Rating"** button on top and save the record. The following use cases may appear:



- A skill is not assigned to a contact (applicant or employee) --> Then, a skill level will be created. The skill level value for the job profile is empty, the required experience value will be taken from the job profile.
- A skill is assigned to a contact and its required experience value is empty or lower than the value for the job profile --> If this is the case, the value for the required value will be changed to the value of the job profile.
- A skill is assigned to a contact and its required experience value is higher than the value for the job profile --> Then, the value for the required value will not be changed.

4.1.4.2 Form "Activity"

As "**Activities**" are separate entities, please see chapter 6.2 for details.

4.1.4.3 Form "Skill Level"

As "**Skill Level**" is a separate entity, please see chapter 4.3.5 for details.

4.1.4.4 Business Process Flow

APPLICATION : INFORMATION

Catherine McGrath - Account Manager - Honag... | Open Placement
Account Man. | Aptitude
good match | Desired Wage
\$42,000.00

Application Received (Active)	First Validation	Interview Phase	Contract Negotiation	Next Stage
✓ Applicant * ✓ Open Placement * ✓ Received On	Catherine McGrath Account Manager - Hon... 5/10/2011	✓ Earliest Start Date ✓ Status Reason *	6/1/2011 Received	

A default business process flow for applications was created. It includes the following stages and fields:

"Application Received":

- "**Applicant**",
- "**Open Placement**",
- "**Received On**",
- "**Earliest Start Date**" and
- "**Status Reason**".

"First Validation":

- "**Aptitude**",
- "**Cover letter available**",
- "**CV available**",
- "**Referral available**" and
- "**Status Reason**".

"Interview Phase":

- "**Status Reason**".

"Contract Negotiation":

- "**Related tasks completed**" and
- "**Negotiations completed**".

Note: Fields can be added specifically just to the process flow. In addition, they can be on the form as well as on the process flow. If this is the case, entering or changing data in a field will apply for the form and the process flow.

The existing job refusal workflow now runs automatically when the respective application record is deactivated with the status reason "**Rejected by company + Auto Refusal**".



4.1.5 Applicants

Active Contacts **Active Applicants** **Active Employees**

Persons shown on a map

Automatic Bird's eye

World • United States • KS

Map of the United States showing applicant locations.

Search Active Applicants

Contact Type: Equals "Applicant"

Status: Equals "Active"

Full Name	Address 1: Street 1	Address 1: ZIP/Postal Code	Address 1: City	Address 1: Country/Region
Catherine McGrath	3915 SE Steel Street	97202	Portland	United States
David Day	1644 31st Street NW	20007	Washington	United States
Harry Chang	385 7th Street E	55101	St. Paul	United States
Jonathan Hall	1100 Michigan Avenue	88310	Alamogordo	United States

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Catherine McGrath

Email: Catherine_McGrath@outlook.com

Preferred Method of Contact: Any

HR Representative: [Patricia Anderson](#)

See more about: Catherine McGrath (Catherine_McGrath@outlook.com)

As applicants are part of the entity "**Contact**", the user might have to select and pin a respective view concerning applicants as described in chapter 3.

The "**Chart**" section shows e.g. in a "**Bing**" map where all the applicants are located. Here, "**Persons shown on a map**" has to be selected.

HUMAN RESOURCES | Applicants | Catherine McGrath |

+ NEW DEACTIVATE CONNECT | ADD TO MARKETING LIST ASSIGN ...

CONTACT : APPLICANT

Catherine McGrath

This is a special form for Human Resource Management. To go back to the regular Contact Form, select "Contact" in the field "Contact Type".

Business Data

Contact Type	Applicant	Notes & Activities
Classification	--	
Salutation	Mrs.	
First Name *	Catherine	
Middle Name	--	
Last Name *	McGrath	

Notes & Activities

NOTES

Enter a note

No Notes found.

Status **Active**



To enter and maintain applicant data, we use the Microsoft Dynamics standard "**Contact**" entity. Here, business and private data, personal reasons, activities and project management data are included (for e.g.). For clarity, we've hidden several fields which don't generally correspond to HR management or to applicants in detail.

Instead, we've added the field "**Contact type**". The user can select from the following types:

- "**Contact**",
- "**Applicant**" and
- "**Employee**".

This way, you can easily transfer an applicant to an employee with one click.

When an applicant is created, only the tab "**Business Data**" is shown. Only if "**Interesting Candidate**" is selected from the picklist "**Classification**", the fields of the tabs "**Private Data**", "**Details**" and "**Notes & Activities**" are displayed. This also includes a "**Bing Maps**" integration which shows the location of the applicant.



4.2 Employee Organization

The "**Organization**" section of "**xRM1 HR Management**" provides all relevant employee data. Applicants can easily be converted to employees.

Business units, facilities and equipment can be organized with the corresponding person responsible.

Corresponding wages and salary models are available for every employee.

Available processes can be defined and equipped with the employees responsible. Allocate resources and track your processes using the RACI model; this makes resource planning easy!

Employee onboarding and offboarding is easily done with templates. Simply connect to the project management section of "**CRM-Project**" and use the available templates.

"**xRM1 HR Management**" enables you to submit absences from one central point in HR management.

Employee contracts and all corresponding information can be easily organized; this can also include disciplinary measures. Add documents or store them directly in your system.

4.2.1 Onboarding/Offboarding

The screenshot shows the xRM1 HR Management software interface. The top navigation bar includes File, Projects, View, Charts, Add, and Customize. Below the navigation bar is a toolbar with various icons for New, Edit, Delete, Activate, Deactivate, Assign, Share, Copy a Link, Email a Link, Follow, Unfollow, Connect, Run Workflow, Start Dialog, Run Report, Export to Excel, Import Data, Advanced Find, Help, Import Project, Fast Time Entry, and Employee Cockpit.

The left sidebar contains a navigation tree with Favorites, a user account (Hailey.Miller@honag.com), and sections for Dynamics HR (Workplace, Sales, Marketing, Service, Projects, Ideas), Human Resources (Recruiting, Organization, Onboarding/Offboarding, Employees, Employment Contracts, Wages, Absence Administration, Disciplinary Measures, Processes, Process Resources, Departments, Facilities/Equipment), Development, and Employee Services. Under Mail, there are links to Dynamics HR and Calendar.

The main content area displays a list of "All Active Projects". One project is selected: "Honag Onboarding Tom Tailor". The details for this project are shown in three tabs: Honag Onboarding Tom Tailor, External Information, and Internal Information. The Internal Information tab shows the following details:

Title (Internal)	Honag Onboarding Tom Tailor	Status Reason	Planning
Owner	Hailey.Miller	Ident Number	PRO0093
Level	Project	Division	
Priority		Classification	
Risk		Code	
Billing			
Parent Project Part			

The Duration tab shows the following timeline:

Real Start	6/5/2011
Start projected	6/5/2011
Last Activity	
End projected	6/30/2011
Fixed Date	No



4.2.1.1 Main form

The screenshot shows the Microsoft Dynamics CRM Project form for a project titled "Honag Onboarding Tom Tailor". The form is divided into sections: General, Duration, and Internal Information.

General: Displays basic project details like Customer (Honag Hawaii LLC), Title (Honag Onboarding Tom Tailor), and Progress (auto) at 0%. It also shows the owner (Hailey Miller), status reason (Planning), and project number (PRO0093).

Duration: Shows the real start date (6/5/2011) and end projected date (6/30/2011). It includes fields for last activity and fixed date.

Internal Information: A table showing internal project details such as title, owner, project, status reason, and planning. A note indicates that a chart cannot be displayed because the view or filter criteria did not return any records.

You can find project templates for employee onboarding and offboarding on our website: www.xRM1.com.

For detailed information on how to create a project from a template, please see chapter 4.2.1.2. For an introduction on how to import a project plan from Microsoft Project, please see chapter 4.2.1.3.

Note: After having created a project from our template, select "**HR Project**" in the "**Classification**" field of the project form. Only then, the project appears in the "**Onboarding/Offboarding Projects**" view.

Below is an overview of project information which is stored in the system. Information in project data fields, as well as a corresponding project node, is divided into the following categories:

- **"General":** General project information.
- **"Duration":** Time related information within the project.
- **"Work":** All information pertaining to man-days within the project.
- **"Costs":** All information pertaining to a project's monetary costs.
- **"Budget":** The budget calculated for the project.
- **"Sales":** Information pertaining to man-days which were quoted to the customer.
- **"Description & Notes":** Information concerning project content, tasks, project goals and more detailed notes.
- **"Settings":** Settings and values pertaining to the project.

Note: Some fields cannot be edited as they are automatically filled in by the system. These write protected fields can be identified by their grey backgrounds.

4.2.1.2 Creating a project from a template

To create a template from a project, simply select the required project template under the "Templates approved" view and run template process.

There are various automation functions available in the project creation process, to help you create a project as accurately as possible.

Firstly, you can define a "**date**" which will be used as a start or end date for the planned project. With this date, the template function pushes all dates forward (for start date) or backward (for end date) for all nodes and activities in the template.

The title of the template (both internal and external), as well as all activities, can be filled automatically with project-related information with the Find and Replace. Specify in the "**Find**" field the term you have entered as a placeholder in the nodes and template activities. Specify in the "**Replace**" field the term(s) which will be used for replacement.

Select the "**Account**" which the newly created project is assigned to.

Select the "**Currency**" of the new project.

Select whether all **project parts and activities** are assigned to the users defined in the template or the user running the template function is assigned all project elements. Then, project parts and activities can be distributed manually if required.



If resources have already been defined in the template via the planning table, the **distribution of work** to these resources can also be used for the new project.

<Template> Implementation 4th module

To change the template state or to generate a new project out of the template, choose the desired options, set the parameters (if necessary) and click 'Start'

This might take some minutes, depending on the chosen options, parameters or the size of your project.

Template in status 'Approved' [inactive]. Available functions:

Edit template
 Generate Project from Template.

Select the date which is used for generating the new project:

6/2/2011 Use date as start projected.
 Use date as end projected.

Find and replace text in Title (Customer) and Title (Internal):

Find: <Template>
Replace:

Account: Template Company

Currency: US Dollar

Assignments of tasks and project nodes in the generated project.

Assign everything to the users defined in the template.
 Assign everything to myself.

Allocate resources as defined in the template.

Yes
 No

Copy Notes from template

Yes, Copy all Notes from template
 No, ignore all Notes

Selecting Start begins the 'project from a template' process. Your predefined project will be generated from the template.

4.2.1.3 Microsoft Project Import

The Microsoft Project interface provides functionality for creating new projects based on Microsoft Project project plans.

The screenshot shows the Microsoft Dynamics CRM Projects interface. At the top, there's a navigation bar with 'PROJECTS' selected. Below it, a list of 'All Active Projects' is shown. A context menu is open over one of the project entries, with 'Import Project' highlighted. Other options in the menu include 'Export to Excel', 'Import Data', 'Advanced Find', 'Employee Cockpit', 'Fast Time Entry', 'Chart Pane', 'New System View', 'Customize Entity', and 'System Views'. On the right side of the screen, there's a sidebar with icons for 'Charts', 'Gantt', and 'Map'.

4.2.1.3.1 Prepare Import

To import a Microsoft Project project plan in CRM-Project, the plan has to first be based on CRM-Project's Microsoft Project import template. Therefore, you must first download the Microsoft Project import template from Microsoft Dynamics.



The system creates a template for Microsoft Project as an XML file. Save this file and open it with Microsoft Project.

	Task Mode	Task Name	Duration	Start	Finish	Predecessors	Resource Names	CRM-Project
1		To use this template, add 1 day	1 day	Fri 12/2/11	Fri 12/2/11			LEVEL/PROJECT
2		Um die Vorlage zu verwe...	1 day	Fri 12/2/11	Fri 12/2/11			LEVEL/PROJECT

Use this template for planning and structuring your project in Microsoft Project. Choose "**Add new Column**" to display the column "**Outline 1 (CRM-Project)**". Through this classification, you can define whether each Microsoft Project task is a project node or a Microsoft Dynamics activity. Furthermore, you can select the project node level and activity type.

The following levels are available for classifying project nodes:

- Program
- Project
- Phase
- Subproject
- Activity Package
- Milestone

The following activity types are available for classifying activities:

- E-mail
- Task
- Rendered Service
- Letter
- Fax
- Phone call
- Appointment
- Service activity



Once you have finished structuring your project, save the project plan in Microsoft Project XML format. The project plan is now ready for **CRM-Project** import.

Note: CRM-Project is able to import Microsoft Project project plans only if they are based on the import template and if they are saved as Microsoft Project XML format!

4.2.1.3.2 Process import

To import your prepared project plan, select "Import Project" in the ribbon menu bar. Choose the account which will be the customer for the new CRM-Project project. Then, choose the project's currency. In most cases, an account will be your company or a standard account in your Microsoft Dynamics.

Select "**Import**" to select the Microsoft Project file. The project will then be created in CRM-Project and be available as a "Planned Project".

The screenshot shows the 'Import Project' dialog box. At the top, there is a ribbon with 'Import Project' selected. Below the ribbon, there are two buttons: 'Import Project' and 'Download Template for I...'. A large blue arrow points down to the main dialog box. The dialog box has a title 'Import Project' and a subtitle 'Import a Microsoft Project Plan as a new project in CRM-Project.' It contains several sections: a warning message about the project plan being based on the Microsoft Project Template; a status message 'Retrieving Entity's metadata'; a section for selecting the account and currency; and a button to 'Select Microsoft Project XML file for import' followed by an 'Import' button.

While processing the import, the following information is transferred from the Microsoft Project Project plan to CRM-Project:

Information in Microsoft Project Plan	Import assigns information to the following Microsoft Dynamics field for
Project nodes	
Task Name	Title internal and Title customer
Notes	Description
Start	Start projected (only Appointment and Service Activity)
Finish	End projected (only Appointment and Service Activity) Due (all other Activity Types)
Work	MD projected (1 MD = 8 hours)
Predecessor	Predecessor
Parent Task	Parent Project Part
CRM-Project Classification	Defines the Microsoft Dynamics Activity Type



4.2.2 Employees

The screenshot shows the xRM1 HR Management software interface. The top navigation bar includes File, Contacts, View, Charts, Add, and Customize. Below the navigation bar is a toolbar with various icons for actions like New, Edit, Delete, Merge, Detect Duplicates, Send Direct Email, Add to Marketing List, Assign, Share, Copy a Link, Email a Link, Connect, Follow, Unfollow, Run Workflow, Start Dialog, Run Report, Export to Excel, Import Data, and Data.

The left sidebar contains a tree view of the application structure:

- Favorites
 - Inbox
 - Sent Items
 - Deleted Items
 - Sent Items
 - Deleted Items
 - Junk E-Mail
 - Outbox
 - RSS Feeds
 - Search Folders
- Dynamics HR
 - Workplace
 - Sales
 - Marketing
 - Service
 - Projects
 - Ideas
 - Human Resources
 - Recruiting
 - Organization
 - Onboarding/Offboarding
 - Employees
 - Employment Contracts
 - Wages
 - Absence Administration
 - Disciplinary Measures
 - Processes
 - Process Resources
 - Departments
 - Facilities/Equipment
 - Development
 - Employee Services
 - Settings
 - Mail
 - Dynamics HR
 - Calendar

The main content area displays a list of "Active Employees" with the following columns: Full Name, Current Job Profile, Department, Business Phone, and Email. The list includes three entries:

Full Name	Current Job Profile	Department	Business Phone	Email
Ethan Carter		Honag US CRM International	+1 (212) 4337-101	Ethan.Carter@honag.com
Grace Harris		Honag Hawaii Training Limited	+1 (808) 1734-106	Grace.Harris@honag.com
Hailey Miller		Honag US CRM International	+1 (212) 4337-102	Hailey.Miller@honag.com

Below the list, it says "1 - 70 of 70" and "Page 1".

The detailed view for Hailey Miller shows the following information:

Hailey Miller
Contract Type: Full-time
Private E-mail:
Home Phone: +1 (718) 453897

Name

Contact Type	Employee	Employing Company
Salutation		Business Phone: +1 (212) 4337-102
First Name	Hailey	Mobile Phone
Middle Name		Fax
Last Name	Miller	Email: Hailey.Miller@honag.com
Job Title	HR Manager	System User: Hailey Miller

Address

Street 1	8801 Queens Boulevard
Street 2	
City	Elmhurst
State/Province	New York
ZIP/Postal Code	11373
Country/Region	United States
Home Phone	+1 (718) 453897
Private E-mail	

[See more about: Hailey Miller.](#)

As employees are part of the entity "**Contact**", the user might have to select and pin a respective view concerning employees as described in chapter 3.

The "**Chart**" section shows e.g. in a "**Bing**" map where all the employees are located. Here, "**Persons shown on a map**" has to be selected.



WORKPLACE | Contacts | Hailey Miller | + NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN | ... | Hailey Miller Honag | ? | ↑ | ↓ | ↻

CONTACT : EMPLOYEE | Hailey Miller | Contract Type: Full-time | Private E-mail: -- | Home Phone: +1 (718) 4538 |

This is a special form for Human Resource Management. To go back to the regular Contact Form, select "Contact" in the field "Contact Type".

Business Data

Contact Type	Employee	Employing Company	--	NOTES
Salutation	--	Business Phone	+1 (212) 4337-102	Enter a note
First Name *	Hailey	Mobile Phone	--	No Notes found.
Middle Name	--	Fax	--	
Last Name *	Miller	Email	Hailey.Miller@honag.com	
Job Title	HR Manager	System User	Hailey Miller	

Professional Information

Manager	Ethan Carter	Department	Honag US CRM International
		Cost Center	--

HR Management

Details		Contract		Bank Data	
Employee ID	--	Hired By	--	Account Holder	--
Full Time Equivalent	--	Hired On	--	Bank Account Number	--
Current Job Profile	--	Start Date	--	Name of Financial Insti:	--
Work Place	New York - USA	Probation Until	--	Bank Code	--
Education	--	Contract End	--	IBAN	--
Social Security Number	--	Employment Duration	--	BIC	--
Employee Type	Active	Work Hours per Week	--	Bank Routing	--
		Contract Type	Full-time		
Status	Active	Owner	Hailey Miller		

For entering and maintaining employee data, xRM1 uses the Microsoft Dynamics standard entity "**Contact**". Business and private data, personal reasons, activities and project management data are all included (for e.g.). For clarity, we've hidden several fields which don't generally correspond to HR management or to employees in detail.

Instead, we've added the "**Contact type**" field, as well as the specific "**HR Management**" fields, which contain data concerning an employee's contract, HR details, health and bank data and (if applicable) information concerning an employee resignation or dismissal.

When the fields "**Start Date**" and "**Contract End**" are changed here, the respective fields in the "**Job History**" entity are also updated automatically.

Furthermore, a "**Bing Maps**" integration was included which shows the location of the employee.



4.2.3 Employment Contracts

Active Employment Contracts

Employee	Start Date	End Date	Type
Catherine McGrath	7/1/2011	None	Full-time
Daniel Brown	3/1/2009	None	Internship
Ethan Carter	2/1/2009	None	Part-time
Hailey Miller	1/1/2009	None	Full-time
Paul Morrison	4/1/2010	None	Full-time
Robert Bonderman	8/15/2009	None	Trainee
Tom Seel	6/15/2009	6/15/2011	Contract worker

Employment Contract Types by... (Employee)

Department(Employee)

Click on the chart to perform Drill Down

Legend:

- Full-time (Green)
- Part-time (Red)
- Trainee (Purple)
- Student (Blue)
- Temporary work (Orange)
- Internship (Yellow)
- Contract worker (Light Green)

As default chart, "**Employment Contract Types by Business Unit**" is displayed in the Outlook start screen of this entity. A bar chart shows which contract types appear how often in the business units.

EMPLOYMENT CONTRACT : INFORMATION

Catherine McGrath - Full-time - 07/01/2011

General

Employee *	Catherine McGrath	Type	Full-time
Start Date	7/1/2011	Classification	Permanent
End Date	--	HR Representative	Patrisha Anderson
Status Reason	In Progress		

Notes

NOTES

Enter a note

File Attachment

[Employment Contract Catherine McGrath.pdf](#)
Patrisha Anderson - Today 9:43:56 AM

Status **Active**

"Employee": Select which person the employee contract is for.

"Start Date": The day the employee contract starts.

"End Date": The day when the employee contract ends.



"Type": The user may choose from several contract types:

- **"Full-time"**,
- **"Part-time"**,
- **"Temporary work"**,
- **"Trainee"**,
- **"Student"**,
- **"Internship"** or
- **"Contract worker"**.

"Classification": Here, the user selects if the employee contract is

- **"Permanent"** or
- **"Fixed Term"**.

"HR Representative": HR Representative which is responsible for this employment Contract:

"Status Reason": The user can select a status reason for each employee contract. Here, he/she can choose between

- **"Draft"**,
- **"In progress"** and
- **"Valid"**.

4.2.4 Wages

The screenshot shows the Dynamics CRM Outlook start screen for the Wages entity. The left navigation bar is open, showing the Wages node under Dynamics HR. The main area displays a bar chart titled "Active Wages" showing wage types by business unit. The chart has four bars: Honag US Consulting (Salary: 1, Bonus: 1), Honag Hawaii Training Limited (Extra pay: 1), Honag Deutschland Consulting (Salary: 1, Bonus: 1), and Honag Canada Central Corporation (Commission Based: 1). Below the chart is a grid of active wages with columns for Employee, Type, Amount, Start Date, End Date, Pay period, and Category. The grid shows six entries for employees Andrew Taylor, Bill Scott, Paul Morrison, Peter Maurer, and Peter Maurer, with various wage types like Extra pay, Commission based, Salary exempt, and Bonus. A search bar at the bottom allows drilling down into specific wage details.

As default chart, **"Wage Types by Business Unit"** is displayed in the Outlook start screen of this entity. A bar chart shows which wage types appear how often in the business units.



"Employee": The person whose wage is displayed.

"Type": Several types of wages can be selected here. The user can choose between:

- **"Salary exempt"**,
- **"Salary non-exempt"**,
- **"Hourly"**,
- **"Commission based"**,
- **"Bonus"**,
- **"Extra pay"** or
- **"non-monetary"**.

"Pay period": Enter the payment interval:

- **"Weekly"**,
- **"Bi-weekly"**,
- **"Monthly"**,
- **"Annually"** or
- **"One-time"**.

"Amount": The user can enter the wage amount here.

"Status Reason": The user can select a status reason for each employee contract. Here, he/she can choose between

- **"Draft"**,
- **"Agreed"** and
- **"In discussion"**.

"Start Date": The day, from which the wage is paid.

"End Date": The day, until which the wage is paid.

"Currency": The wage currency per unit can be selected here.

"HR Representative": Users can enter the HR manager responsible for employee here.

"Remarks": You can enter any comments concerning wage here.



4.2.5 Absence Administration

The screenshot shows the Microsoft Dynamics Absence Administration screen within the Outlook interface. The top navigation bar includes File, Home, and various icons for New Activity, New Record, Import Data, Advanced Find, Help, Employee Cockpit, Fast Time Entry, and Projects. On the left, a navigation tree under 'Dynamics HR' shows categories like Workplace, Sales, Marketing, Service, Projects, Ideas, Human Resources, Organization, Wages, Absence Administration (which is selected), Disciplinary Measures, Processes, Process Resources, Departments, Facilities/Equipment, Development, Employee Services, and Settings. Below the tree are links for Mail, Dynamics HR, and Calendar. The main workspace is titled 'Create' and shows a dropdown menu for 'Type' under 'Absence Reason' containing options: Business Closure, Absence, Sick leave, Public Holiday, New Annual Leave, and Remaining days of leave (expired). A section titled 'Current Projects / Comments' is also visible.

After selecting the "**Absence Administration**" in Outlook, the goldbright screen which is identical to the one in Microsoft Dynamics appears immediately instead of the Outlook start screen.

"Absence Reason": Here, the user can select what the reason for the absence is:

- **"Business Closure"**,
- **"Absence"**,
- **"Sick leave"**
- **"Public Holiday"** or
- **"New Annual Leave"**.

You can also administer expired **"Remaining days of leave"**.

"Employee": Choose which employee is absent.

"Times - Start": The day and time the absence starts.

"Times - End": The day and time the absence ends.

"Whole Day Event": If the absence is compiled of full work days, the user has to select this box.

"Days" / "Days of leave": The user can enter the amount of absence days here.

For absence administration settings, please see chapter 2.1.



4.2.6 Absence Calendar

4.2.6.1 Prerequisites

The fundamental prerequisite for the absence calendar are up-to-date information on the availability of existing resources, especially in terms of attendance, leaves and sickness. This is why the following settings concerning employee work hours must be configured beforehand in the system.

For information on the availability of employees to be shown correctly, the work hours of employees must be set correctly in the system. This is a standard function of Microsoft Dynamics. The settings must be configured in the calendar of individual users.

USER : CRM-PROJECT HR MANAGER ▾

Paul Morrison

The information provided in this form is viewable by the entire organization.

Monthly View

Set Up | X | More Actions ▾

New Weekly Schedule
Work Schedule for One Day
Time Off

		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	1	2	3	4	
5	6	7	8	9	10	11	
12	13	14	15	16	17	18	
19	20	21	22	23	24	25	
26	27	28	29	30	1	2	
3	4	5	6	7	8	9	

(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

Status Enabled



Weekly Schedule

Set the recurring weekly schedule

Work Hours Are the same each day [Set Work Hours](#)
 Vary by day
 None. Resource is not working

Work Days Sun Mon Tue Wed
 Thu Fri Sat

Business Closures Observe
 Do not observe

Date Range

Starting On No End Date

Time Zone

Note: Always set the selection to "**Observe**" in the "**Business closures**" area to ensure that public holidays and vacation are shown correctly in resource planning.

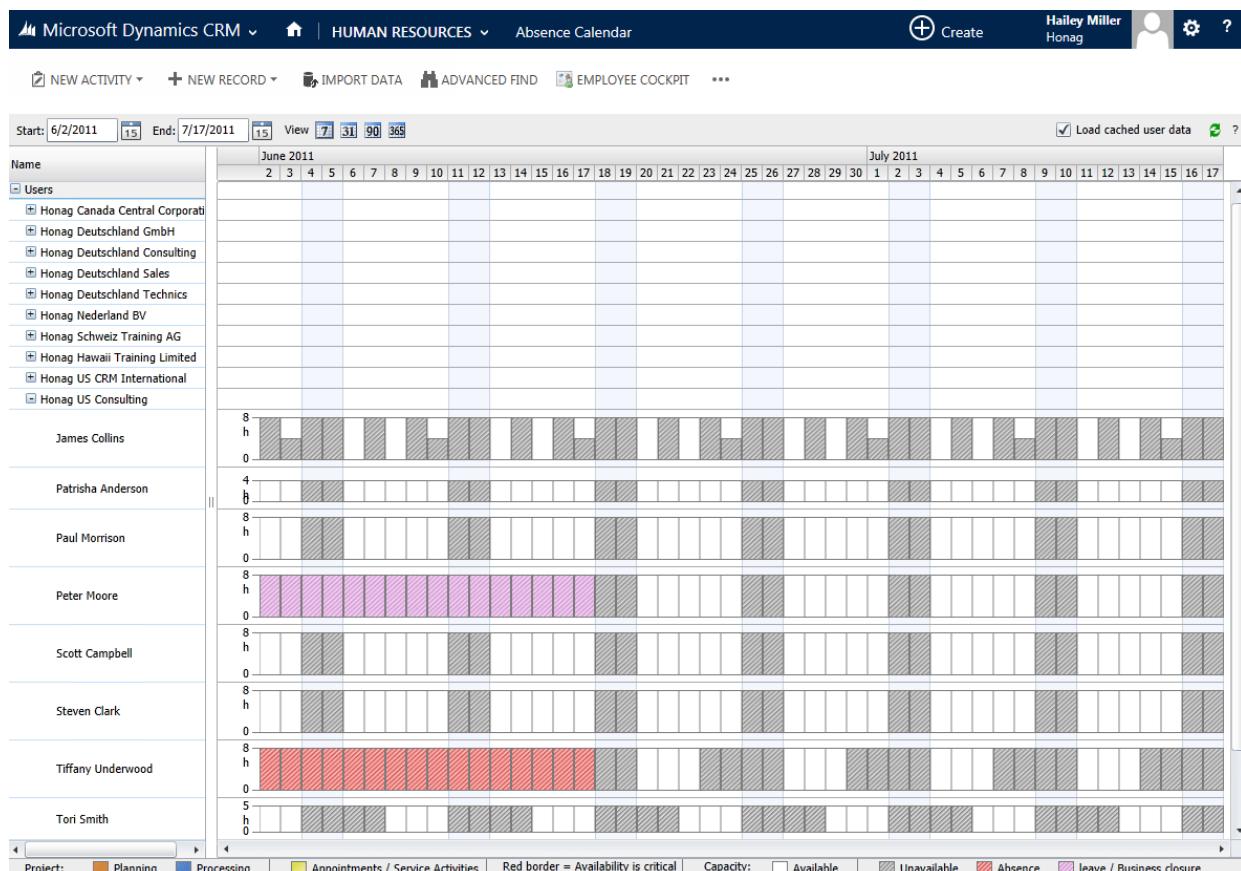
4.2.6.2 Form

This view displays the availability of all employees. Work hours per day, attendances, absences, leaves/business closure and unavailability are shown in different colors:

- white = "**Available**",
- grey = "**Unavailable**",
- red = "**Absence**" and
- purple = "**Leave/Business Closure**".

Therefore, employees can be scheduled faster and more easily. All parts of a useful workforce management can be seen at a glance.

Note: When you use "**CRM-Project**" as well, the "**Absence Calendar**" shows besides attendances and leaves also the resource usage.





Tip: For more details on the activities scheduled for an employee on a particular day, simply move the mouse to that day; displayed next to the mouse, as a tool, is the specific day schedule.

4.2.7 Disciplinary Measures

The screenshot shows the Dynamics HR application interface. The left sidebar has a tree view of HR modules like Workplace, Sales, Marketing, Projects, Human Resources, etc. The 'Disciplinary Measures' node is selected. The main area has a ribbon with File, Disciplinary Measures, View, Charts, Add, Customize, and various collaboration and reporting tools. Below the ribbon is a search bar and a grid titled 'Active Disciplinary Measures' showing three rows of data. To the right is a chart titled 'Disciplinary Measures b...' showing two bars for 'Honag US Sales' and 'Honag US Consu...'. The bottom section shows a detailed view of a disciplinary measure for 'Repeated tardiness' with fields for Reason, Employee, Level, Date, HR Representative, Status Reason, and Remarks. A note section indicates no notes are present.

As default chart, "**Disciplinary Measures by Business Unit**" is displayed in the Outlook start screen of this entity. A bar chart shows how many disciplinary measures of which level were given in the business units.

This screenshot shows a detailed view of a disciplinary measure for 'Repeated tardiness'. The top navigation bar includes HUMAN RESOURCES, Disciplinary Measures, and Repeated tardiness. The toolbar has buttons for NEW, DEACTIVATE, DELETE, ASSIGN, SHARE, and others. The main content area is titled 'DISCIPLINARY MEASURE : INFORMATION' and shows the title 'Repeated tardiness'. Below it is a 'General' section with fields: Reason (Repeated tardiness), Employee (Paul Morrison), Level (verbal), and Remarks (At least 5 times from Sept to Nov, 2010). There is also a 'Date' field (12/3/2010), an 'HR Representative' field (Hailey Miller), and a 'Status Reason' field (Valid). A 'Notes' section below states there are no notes for this disciplinary measure.

"Reason": Define a specific reason for the disciplinary measure here.

"Employee": Select which person receives the disciplinary measure.

"Level": The user may choose from several levels:

- **"verbal"**,
- **"written"** or
- **"terminated"**.

"Date": The day when the disciplinary measure was given.



"HR Representative": HR Representative who is responsible for the disciplinary measure.

"Status Reason": The user can select a status reason for each measure. Here, he/she can choose between

- **"Draft"**,
- **"In progress"** and
- **"Valid"**.

"Remarks": Describe the reprimand in more detail or add any additional comments in this field.

4.2.8 Processes

The screenshot shows the Dynamics 365 Processes screen. On the left, there's a navigation pane with sections like Workplace, Sales, Marketing, Projects, Human Resources, and various sub-sections under HR. The 'Processes' section is currently selected. The main area has three tabs: 'Active Processes', 'Process by Level', and 'Process Details'. The 'Active Processes' tab displays a list of processes with columns for Name, Full Time Equivalent, and Process Types. The 'Process by Level' tab shows a bar chart with two categories: 'Management Process' (1) and 'Core Process' (3). The 'Process Details' tab is open for the 'HR Management' process, showing details like Name (HR Management), Full Time Equivalent (0.100), Status Reason (Implemented), and Process Resources (Employee: Hailey Miller, RACI: Accountable, Substitute: Hannelore Mader, Status Reason: Confirmed).

As default chart, **"Process by Level"** is displayed in the Outlook start screen of this entity. A bar chart shows how many processes call a certain level.



4.2.8.1 Main form

On top of the main form, two additional charts are shown:

The column chart "**Process FTE by RACI**" shows how many FTE are connected with which RACI level per process.

The bar chart "**FTE by Employee and RACI**" displays how many FTE are connected with which RACI level per employee.

Besides these charts, the following fields are on the form:

"Name": Enter the name of the process.

"Parent Process Part": If the process is attached to a parent process part, the user may select the parent here.

"Full Time Equivalent": Enter how many full time equivalents (FTE) the process consists of.

"Process Types": The user may select from the following process types:

- **"Management Process"**,
- **"Core Process"** or
- **"Supporting Process"**.

"Status Reason": The user can select a status reason for each process. Here, he/she can choose between

- **"Draft"**,
- **"In Implementation"** and
- **"Implemented"**.

"Process Resources": can be entered in the following sub-grid.

4.2.8.2 Form "Process Resource"

As "**Process Resource**" is a separate entity, please see 4.2.9 for more information.

4.2.8.3 Trigger

For each process, the user may use a trigger. The trigger can be found by clicking on "... --> **"Other activities"** -> **"Trigger"** in the "**Process**" form. A trigger includes the following fields:

"Subject": A subject is mandatory for each trigger. Besides, there is a text field so that more information can be provided.

"Process": Here, the user may enter the respective process for the trigger. If the trigger is created from a "**Process**" record, this field is filled automatically with the content of the "**Regarding**" field.

"Regarding": Here, the user may enter a regarding object for the trigger. If the trigger is created from a "**Process**" record, this field is filled automatically with the respective process.



"Owner": The owner of the trigger is shown here.

"Scheduled Duration": The duration can be selected of a pick-list.

"Due Date": A due date can also be chosen.

"Priority": The user may prioritize the trigger in term of

- **"Low"**,
- **"Normal"** and
- **"High"**.

The screenshot shows the xRM1 HR Management software interface. At the top, there's a navigation bar with icons for back, forward, home, and search, followed by the text "Recruiting" and a dropdown menu. On the right side of the nav bar are user profile information ("Hailey Miller Honag") and system navigation icons (+, gear, question mark).

Below the nav bar is a toolbar with buttons for "MARK COMPLETE", "DELETE", "CLOSE TRIGGER", "TO OPPORTUNITY", "TO CASE", and three dots (...). The main content area has a header "TRIGGER : INFORMATION" and a section title "Recruiting".

General

Subject * Recruiting

Recruitment refers to the overall process of attracting, selecting and appointing suitable candidates for jobs within an organisation, either permanent or temporary. Recruitment can also refer to processes involved in choosing individuals for unpaid positions, such as voluntary roles or training programmes.

Recruitment may be undertaken in-house by managers, human resource generalists and/or recruitment specialists. Alternatively, parts of the process may be undertaken by either public-sector employment agencies, commercial recruitment agencies, or specialist search consultancies.

The use of internet-based services and computer technologies to support all aspects of recruitment activity and processes has become widespread.

Process [HR Management Recruiting](#)

Regarding [HR Management](#)

Owner * Hailey Miller

Scheduled Duration 0 minutes Priority Normal

Due Date 6/5/2011 2:00 AM

Notes

Activity Status Open



4.2.9 Process Resources

Employee	Full Time Equivalent	Process	RACI
Edgar Casini	0.1	HR Management Development	Responsible
Ethan Carter	0.1	HR Management Development	Responsible
Hailey Miller	0.5	HR Management Recruiting	Responsible
Hailey Miller	0.1	HR Management Development	Accountable
Hailey Miller	0.4	HR Management Organization	Responsible
Hailey Miller	0.1	HR Management	Accountable
Hannelore Mader	0.2	HR Management Recruiting	Responsible
Hannelore Mader	0.2	HR Management Organization	Responsible

FTE by Employee and R...

Employee

Sum (Full Time Equivalent)

0.000 0.500 1.000

Responsible Accountable

Click on the chart to perform Drill Down

Hailey Miller - HR Management Development - Accountable - 0.1

General

Process	HR Management Development	RACI	Accountable
Employee	Hailey Miller	Full Time Equivalent	0.100
Substitute	Hannelore Mader		
Status Reason	Confirmed		

Notes

As default chart, "**FTE by Employee and RACI**" which was described above, is displayed in the Outlook start screen of this entity.

PROCESS RESOURCE : INFORMATION

Hailey Miller - HR Management Development - Accountable - 0.1

General

Process	HR Management Development	RACI	Accountable
Employee	Hailey Miller	Full Time Equivalent	0.100
Substitute	Hannelore Mader		
Status Reason	Confirmed		

Notes

Process: The process which the resource is attached to can be selected here.

Employee: Select the person which is the process resource, in this field.

Substitute: If the chosen employee is not available, the here entered person is his/her substitute.

RACI: RACI defines the responsibility of a resource for certain process tasks. Thus, the user may select whether the process resource is

- **“Responsible”**,
- **“Accountable”**,
- **“Consulted”** or
- **“Informed”**.

Full Time Equivalent: Here you can enter how much time, in terms of full time equivalent (FTE), the process resource is taking in the process.



"Approved by": Each process resource needs to be approved.

"Status Reason": The user can select a status reason for each process resource record. Here, he/she can choose between

- **"Draft"**,
- **"In Implementation"** and
- **"Implemented"**.

4.2.10 Departments

The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes File, Home, and various tool icons. The ribbon menu has sections for Activities, New Record, Import Data, Help, Fast Time Entry, Employee Cockpit, and Projects. On the left, a navigation pane under 'Dynamics HR' shows categories like Workplace, Sales, Marketing, Service, Ideas, Human Resources (with sub-items like Recruiting, Organization, Employees, Departments, Facilities/Equipment, Wages, Processes, Process Resources, Onboarding/Offboarding, Absence Administration, Employment Contracts, Disciplinary Measures), Development, Employee Services, Settings, and Business. Below this is a 'Mail' section with Dynamics HR, Calendar, Contacts, Tasks, Notes, Folder List, and Shortcuts. The main content area displays a list titled 'Active Business Units' with columns: Name, Main Phone, Website, and Parent Business. The list contains 16 entries, all from Honag, including Honag Austria AG, Honag Canada Central Corporation, Honag Deutschland Consulting, Honag Deutschland GmbH, Honag Deutschland Sales, Honag Deutschland Technics, Honag Europe, Honag France SA, Honag Hawaii Training Limited, Honag Italia SRL, Honag Nederland BV, Honag Schweiz Training AG, Honag US Consulting, Honag US CRM International, Honag US Sales, and Honag US Technics. The bottom of the list shows page navigation with '1 - 16 of 16 (0 selected)' and 'Page 1'.

For "**Departments**", we use the Microsoft Dynamics standard entity "**Business Unit**". This entity contains general information about a department, its address data and the corresponding project management fields.



File Actions

Business Unit: Honag Austria AG

Information

General

Name *	Honag Austria AG	Main Phone	+43 (222) 9399914-0
Division		Other Phone	
Parent Business *	Honag Europe	Fax	
Website	http://www.honag.at	Email	

Addresses

Bill To Address

Street 1	State/Province
Street 2	ZIP/Postal Code
Street 3	Country/Region
City	

Ship To Address

Street 1	State/Province
Street 2	ZIP/Postal Code
Street 3	Country/Region
City	

Project Management

General

Business Unit Manager	Area
Type	Department-ID
Number of Employees	
Settings	

Show in Planning Table Yes No Capacity [MD/Day] 5.00

Related

- Organization**
 - Users
 - Business Units
 - Teams
 - Facilities/Equipment
 - Resource Groups
- Common**
 - Audit History
 - Idea Business Unit Ref...
 - Contacts
 - Job Profiles
 - Open Placements
 - Project Team
- Process Sessions**
 - Background Processes
 - Real-time Processes



4.2.11 Facilities/Equipment

The screenshot shows the xRM1 HR Management application interface. The top navigation bar includes File, Home, New Activity (New Record), Import Data, Advanced Find Tools, Help, Employee Cockpit, Fast Time Entry, and Projects. The left sidebar has Favorites (Inbox, Sent Items, Deleted Items) and Dynamics HR sections (Workplace, Sales, Marketing, Service, Projects, Ideas, Human Resources, Recruiting, Organization, Onboarding/Offboarding, Employees, Employment Contracts, Wages, Absence Administration, Disciplinary Measures, Processes, Process Resources, Departments, Facilities/Equipment). The main content area displays a list titled "Local Facilities/Equipment" with a search bar. The list shows four items: "BMW company car" (Business Unit: Honag US CRM International), "BMW Ethan Carter" (Business Unit: Honag US CRM International), "Notebook Ethan Carter" (Business Unit: Honag US CRM International), and "Notebook Hailey Miller" (Business Unit: Honag US CRM International). The bottom status bar indicates "1 - 4 of 4 (1 selected)" and "Page 1".

Name	Business Unit
BMW company car	Honag US CRM International
BMW Ethan Carter	Honag US CRM International
Notebook Ethan Carter	Honag US CRM International
Notebook Hailey Miller	Honag US CRM International



Facility/Equipment: BMW company car

Information

Facility/Equipment : Information

General

Name *

Business Unit*

Site

Primary Email

Time Zone *

Description

Related

Common

- Work Hours
- Connections
- Audit History

Service

- Services
- Resource Groups

Process Sessions

- Background Processes
- Real-time Processes

"Name": Give a name to facilities/equipment here.

"Business Unit": Here you can select the respective business unit or department to which a resource belongs.

"Site": Select which site the facility/equipment is located. The site is the location of the respective business unit.

"Primary E-Mail": Primary e-mail address of the selected business unit.

"Time Zone": The user can select the time zone of the site where the facility/equipment is located.

"Description": A detailed description of the resource and its usage can be entered here.

"Expense per Unit": Here you can insert the budget per unit, when using the resource.

"Currency": The expense currency per unit can be selected here.



4.3 Employee Development

See individual employee and applicant job histories in the "**Development**" section.

Organize required skills and competences. In addition, you can track employee skill levels and development targets.

When necessary, prior and future health checks can be listed.

"xRM1 HR Management" supports you by tracking performance review details, target achievements and future steps for improvement.

The educational background of applicants and employees can be listed. Organize employee certifications, including qualification levels and corresponding certificates.

4.3.1 Job History

Employee	Job Profile	Account
Paul Morrison	Project Manager	Contoso
Paul Morrison	Senior Consultant	Baker Limited
Paul Morrison	Senior Consultant	Metro
Grace Harris	Senior Consultant	Contoso
Bill Scott	Junior Consultant	Supplier Group

Account	Count
Metro	2
Baker Limited	1
Supplier Group	1
Contoso	1

Paul Morrison - Metro - Senior Consultant - 02/01/2006 - 03/31/2010

General	
Employee	Paul Morrison
Job Profile	Senior Consultant
Start Date	2/1/2006
Employment Duration	
End Date	3/31/2010
Remarks	
Account	Metro
Business Unit	--
HR Representative	Hailey Miller
Status Reason	Historic job
Status Reason	Historic job

As default chart, "**Top 10 Job History Accounts**" is displayed in the Outlook start screen of this entity. A bar chart shows the accounts where most of the current employees worked before.

General

Employee	Paul Morrison	Account	Metro
Job Profile	Senior Consultant	Business Unit	--
Start Date	2/1/2006	HR Representative *	Hailey Miller
Employment Duration	4 Years 1 Months	Status Reason	Historic job
End Date	3/31/2010	Status Reason	Historic job
Remarks	--		

Notes

"Employee": Select which person the job history belongs to.



"Job Profile": The user can choose the applicable job profile here.

"Start Date": The day the previous job began.

"Employment Duration": The value in this field is calculated automatically. If the record shows an employee's current job, the field shows the difference between the current date and the start date. If the record shows an employee's previous job, the field shows the difference between the end date and the start date.

"End Date": The day the job ended.

"Account": If the job was in another company, select the respective account in this look-up field.

"Business Unit": If the position was internal, for a previous department, select the respective business unit from this look-up field.

"HR Representative": The HR representative who is also the owner of the record.

"Status Reason": The user can select a status reason for each job history record. Here, he/she can choose between

- **"Historic job"** and
- **"Current job"**.

"Remarks": Describe the job in more detail or add any additional comments in this field.

4.3.2 Education

As default chart, **"Achieved Certification Scores by Business Unit"** is displayed in the Outlook start screen of this entity. A column chart shows per business unit, how many points of how many total points were achieved at in education exams and certificates.

xRM1 HR Management

Microsoft Dynamics CRM | HUMAN RESOURCES | Education | Paul Morrison - Cer... | Create | Hailey Miller Honag | ?

+ NEW | DEACTIVATE | DELETE | ASSIGN | SHARE | ...

EDUCATION : INFORMATION
Paul Morrison - Certified Project Manager (IPMA) - Level C - 02/17/2010

General

Employee	<u>Paul Morrison</u>	Achieved on	2/17/2010
Status Reason	Valid	Valid until	2/16/2013
Certificate	<u>Certified Project Manager (IPMA) - Level C</u>		

Score

Achieved Score	--	Maximum Score	---
----------------	----	---------------	-----

Costs

Costs	\$2,900.00	Paid By	Company
Currency	<u>US Dollar</u>		

"Employee": Select which person the further education applies to.

"Date of Certification": The day when the employee received the certification.

"Certificate": Select which certificate was received.

"Achieved on": Enter the date when the education was completed successfully.

"Valid until": Enter the date until when the education/certificate is valid.

"Achieved Score": If applicable, the user can enter the employee's certification score.

"Maximum Score": If the certification test included a maximum score, it is shown here. This field is write protected; the maximum score is filed in the "**Certificate**" form. Please see chapter 4.3.3 for further details.

"Costs": Here, the user can enter how much the certification cost.

"Paid by": Select if the payment was covered by:

- **"Employee"** or
- **"Company"**.

"Currency": Select the payment currency used for the certification.

4.3.3 Certificates

Active Certificates

Name	ID	Maximum Score	Type	Status Reason
Cambridge Certificate in Advanced English	CAE	500	Language Certificate	Current Version
Cambridge Certificate of Proficiency in English	CPE	500	Language Certificate	Current Version
Certified Project Director (IPMA) - Level A	IPMA A	1,000	Professional Certificate	Current Version
Certified Project Management Associate (IPMA) - Level D	IPMA D	1,000	Professional Certificate	Current Version
Certified Project Manager (IPMA) - Level C	IPMA C	1,000	Professional Certificate	Current Version
Certified Senior Project Manager (IPMA) - Level B	IPMA B	1,000	Professional Certificate	Current Version
MCTS: Managing Microsoft Dynamics Implementations ...	MCTS 3	1,000	Professional Certificate	Current Version
MCTS: Microsoft Dynamics CRM 2013 Customization an...	MCTS 2	1,000	Professional Certificate	Current Version
Organization Development and Change	BUS ADM...	100	Soft Skill Certificate	Current Version

Cambridge Certificate in Advanced English

General

Name	Cambridge Certificate in Advanced English	Maximum Score	500.00
ID	CAE	HR Representative	<u>Hailey Miller</u>
Type	Language Certificate	Status Reason	Current Version

Notes

There are no Notes for this Certificate.



As default chart, "**Certificates by type**" is displayed in the Outlook start screen of this entity. A pie chart shows how many certificates call a certain type.

The screenshot shows the Microsoft Dynamics 365 Human Resources Certificates page. At the top, there are navigation links for Home, HUMAN RESOURCES, Certificates, and Cambridge Certificates. On the right, there are user profile and settings icons. Below the header, there are buttons for NEW, DEACTIVATE, DELETE, ASSIGN, SHARE, and more. The main content area displays a certificate record titled "Cambridge Certificate in Advanced English". The General section contains the following details:

Name	Cambridge Certificate in Advanced English	Maximum Score	500.00
ID	CAE	HR Representative*	Hailey Miller
Type	Language Certificate	Status Reason	Current Version

"Name": Enter which specific certificate is described.

"ID": If the certificate has an ID number, it can be entered in this field.

"Type": Select between the following certificate types:

- **"Professional Certificate"**,
- **"Language Certificate"**,
- **"Soft Skill Certificate"** or
- **"Other Certificate"**.

"Maximum Score": If the certification test included a maximum score, the user can enter it here.

"HR Representative": The HR representative is the owner of the record.

"Status Reason": The user can select a status reason for each certificate. Here, he/she can choose between

- **"Draft"** and
- **"Current Version"**.



4.3.4 Skills

The screenshot shows the Microsoft Dynamics CRM Skills module. At the top, there's a ribbon with tabs like File, Skills, View, Charts, Add, and Customize. Below the ribbon is a toolbar with icons for Chart Pane, New Chart, Edit Chart, Save As, Import Chart, Export Chart, Refresh Chart, Assign, Share, and Collaborate.

The main area has a sidebar on the left containing Favorites (Inbox, Sent Items, Deleted Items), Halley.Miller@honag.com (Inbox, Drafts, Sent Items, Deleted Items, Junk E-Mail, Outbox, RSS Feeds, Search Folders), Dynamics HR (Workplace, Sales, Marketing, Projects, Human Resources, Development, Skills, Skill Levels), and Mail (Dynamics HR, Calendar, Contacts, Tasks).

The central pane displays "Active Skills" in a grid format:

Type	Name	Categories
Language Skill	English	
Professional Skill	Project Management	
Professional Skill	Sales	

A pie chart titled "Skills by Type" is shown on the right, divided into two segments: 1 (red) and 2 (blue). A legend indicates that blue represents "Professional Skill" and red represents "Language Skill".

Below the grid, there's a section for "Project Management" with "General" and "Notes" tabs. The General tab shows the skill details: Name (Project Management), Type (Professional Skill), and Owner (Hailey Miller). The Notes tab states: "There are no Notes for this Skill."

As default chart, "**Skills by type**" is displayed in the Outlook start screen of this entity. A pie chart shows how many skills call a certain type.

The screenshot shows the Microsoft Dynamics CRM Project Management entity record. At the top, there's a header with the Microsoft Dynamics CRM logo, the project name "Project Management", and a user profile for "Hailey Miller Honag".

Below the header are standard CRM navigation buttons: NEW, DEACTIVATE, DELETE, ASSIGN, SHARE, and more.

The main content area has a title "SKILL : INFORMATION" and a heading "Project Management".

General section:

Name	Project Management	Owner *	Hailey Miller
Type	Professional Skill		
Description	--		

Notes section:

NOTES

Enter a note

No Notes found.

Status: Active

"Name": Name of the skill.

"Type": Select between the following skill types:

- **"Professional Skill"**,
- **"Language Skill"**,
- **"Soft Skill"** or
- **"Other Skill"**.



"Description": Enter detailed description of the skill here.

"HR Representative": The HR representative is the owner of the record.

4.3.5 Skill Levels

The screenshot shows the Microsoft Dynamics CRM interface for Skill Levels. On the left, there's a navigation pane with various modules like Workplace, Sales, Marketing, Projects, Human Resources, Development, Skills, and Skill Levels. The Skill Levels module is selected. The main area has a toolbar with options like New, Edit, Delete, Share, Assign, Run Workflow Process, Start Dialog, Run Report, Export to Excel, Import Data, Advanced Find, and Help. Below the toolbar is a grid titled "Active Skill Levels" showing a list of skills with columns for Skill, Type (Skill), Employee, and Required. A bar chart titled "Skill Gap" is displayed on the right, comparing required vs. actual counts for skills like Vertrieb, Sales, Project Management, and English. At the bottom, there's a detailed view for the skill "English - Catherine McGrath" with sections for General, Experience Rating, and Notes.

Skill	Type (Skill)	Employee	Required
English	Language Skill	Catherine McGrath	4
English	Language Skill	David Day	4
English	Language Skill		4
English	Language Skill		4
Project Management	Professional Skill	David Day	3
Project Management	Professional Skill		3
Sales	Professional Skill	Catherine McGrath	5
Sales	Professional Skill	David Day	3
Vertrieb	Professional Skill		3
Vertrieb	Professional Skill		5

English - Catherine McGrath

General

Skill	English	Employee	Catherine McGrath
HR Representative	Hailey Miller	Job Profile	
Status Reason	Current Level		

Experience Rating

Required	4	Actual	4
----------	---	--------	---

Notes

There are no Notes for this Skill Level.

As default chart, "**Skill Gap**" is displayed in the Outlook start screen of this entity. A bar chart shows if values were set for "**Required**" and "**Actual**" levels of a skill.

The screenshot shows the Microsoft Dynamics CRM Skill Level Information page for the skill "English - David Day". The top navigation bar includes links for NEW, DEACTIVATE, DELETE, ASSIGN, SHARE, and more. The main title is "SKILL LEVEL : INFORMATION" followed by "English - David Day". Below the title, there's a "General" section with fields for Skill (English), Employee (David Day), HR Representative (Hailey Miller), and Status Reason (Current Level). There's also an "Experience Rating" section showing Required and Actual values both as 4. A "Notes" section indicates there are no notes for this skill level.

Skill	English	Employee	David Day
HR Representative*	Hailey Miller		
Status Reason	Current Level		

Experience Rating

Required	4	Actual	4
----------	---	--------	---

"Skill": Select the skill corresponding to this record here.

"Employee": If the skill level is set for an employee, it can be selected here.

"Job Profile": If the skill level is set for a job profile, it can be selected here.

"HR Representative": The HR representative is the owner of the record.

"Status Reason": Select the status reason for each skill level record:



- "Current Level",
- "To be evaluated" or
- "To be confirmed".

"Required": Enter a value for the required skill level here. The user has the choice between "0" (worst) and "5" (best).

"Actual": Enter a value for the actual skill level here. The user has the choice between "0" (worst) and "5" (best).

4.3.6 Performance Reviews

The screenshot shows the Microsoft Dynamics CRM interface for Performance Reviews. The top navigation bar includes File, Performance Reviews, View, Charts, Add, and Customize. Below the navigation is a toolbar with various actions like New, Edit, Delete, Assign, Share, Copy a Link, Follow, Unfollow, Run Workflow Dialog, Start Workflow Process, Run Report, Export to Excel, Import Data, Advanced Find, and Help.

The left sidebar displays the Dynamics HR navigation tree, with Human Resources selected, showing sub-options like My Work, Recruiting, Organization, Development, Job History, Education, Certificates, Skills, Skill Levels, and Performance Reviews (which is also highlighted).

The main content area shows a grid titled "Active Performance Reviews" with columns for Date, Employee, Manager, Valid until, and Next Rev. It lists two entries: one for Hailey Miller (Employee: 5/2/2010, Manager: Ethan Carter, Valid until: 5/1/2011, Next Rev: 5/2/2011) and another for Paul Morrison (Employee: 4/1/2011, Manager: Ethan Carter, Valid until: 3/31/2011, Next Rev: 4/1/2012). To the right of the grid is a bar chart titled "Target Achievement (all employees)" comparing years 2011 and 2010. The chart shows percentages: 2011 is at 50% (NO / PARTIALLY) and 2010 is at 100% (YES). A legend indicates: NO / PARTIALLY (red), YES (green).

Below the grid, there's a section for "Paul Morrison - 04/01/2011" with tabs for General and Review Details. The General tab shows details like Employee (Paul Morrison), Manager (Ethan Carter), Date (4/1/2011), Next Review (4/1/2012), and Status Reason (Planned). The Review Details tab lists three items: "Manage projects successfully" (Evaluation, Employee: Paul Morrison, Required Completion Date: 3/31/2011, Status: Yes, Reason: Valid), "Improve System Integration Competencies" (Target, Employee: Paul Morrison, Required Completion Date: 9/30/2011, Status: Partially, Reason: Valid), and "Achieve Project Management Competencies" (Target, Employee: Paul Morrison, Required Completion Date: 11/30/2011, Status: No, Reason: Valid).

As default chart, "**Overdue Performance Review by Business Unit**" is displayed in the Outlook start screen of this entity. A column chart shows how many performance reviews for employees are overdue, sorted by business unit.

4.3.6.1 Main form

The screenshot shows the Microsoft Dynamics CRM Performance Review main form for Paul Morrison (ID: 04/01/2011). The top navigation bar includes Microsoft Dynamics CRM, Home, HUMAN RESOURCES, Performance Reviews, Paul Morrison - 04/01/2011, Create, and a user profile for Hailey Miller Honag.

The main content area is titled "PERFORMANCE REVIEW : INFORMATION" and shows the details for "Paul Morrison - 04/01/2011".

General section:

Employee	<u>Paul Morrison</u>	Manager	<u>Ethan Carter</u>
Date	4/1/2011	Next Review	4/1/2012
Valid until	3/31/2011	Status Reason	Planned

Review Details section:

Name	Type	Certificate	Employee	Required Completion Dat...	Completed...	Status Reason...
Manage projects successfully	Evaluation		Paul Morrison	3/31/2011	Yes	Valid
Improve System Integration Competencies	Target		Paul Morrison	9/30/2011	Partially	Valid
Achieve Project Management Competencies	Target	Certified Project Director (IPMA) - Level A	Paul Morrison	11/30/2011	No	Valid

"Employee": Select which person the performance review is for.

"Manager": The manager who conducted the employee review.

"Date": The day when review took place.



"Next Review": The day when the next review is scheduled to take place.

"Valid until": Enter the date until when the performance review is valid.

"Status Reason": Select the status reason for each performance review:

- **"Planned"**,
- **"In Progress"** or
- **"Valid"**.

4.3.6.2 Form "Review Detail"

As **"Review Detail"** is a separate entity, please see chapter 4.3.7 for details.

4.3.7 Review Details

The screenshot shows the Dynamics HR application interface. The top navigation bar includes File, Review Details, View, Charts, Add, and Customize. Below the navigation bar is a toolbar with various icons for New, Edit, Delete, Assign, Share, Copy a Link, Email a Link, Run Workflow, Start Dialog, Run Report, Export to Excel, Import Data, Advanced Find, and Help. On the left, a sidebar menu is open under the Dynamics HR section, showing categories like Workplace, Sales, Marketing, Projects, Human Resources, Development, and Employee Services. The main content area displays a list titled "Active Review Details" with items such as "Manage projects successfully" (Evaluation), "Reorganize personnel files" (Target), "Improve System Integration Competences" (Target), and "Achieve Project Management Competences" (Target). To the right of the list is a chart titled "Target Achievement by Business Unit" showing completion percentages for two business units: Honag ... and Honag ... (Department/Employee). The chart has three bars: one red (NO / '') at 50%, one yellow (PAR...) at 50%, and one green (YES) at 100%. A legend indicates the colors for NO / '', PAR..., and YES. Below the chart, a message says "Click on the chart to perform Drill Down". At the bottom of the main content area, there is a detailed view for the item "Manage projects successfully", showing fields for Name, Type, Certificate, Employee, Status Reason, Completion, and Manager.

As default chart, **"Target Achievement by Business Unit"** is displayed in the Outlook start screen of this entity. A column chart shows how many percent of the targets of a business unit have been completed (totally or partially) or not.



4.3.7.1 Main form

Microsoft Dynamics CRM Manage projects su... | [Hailey Miller](#) [Honag](#) [?](#)

+ NEW [DEACTIVATE](#) [DELETE](#) [ASSIGN](#) [SHARE](#) ...

REVIEW DETAIL : INFORMATION

Manage projects successfully

General

Details

Name	Manage projects successfully	Required Completion Date	3/31/2011
Type	Evaluation	Performance Review	Paul Morrison - 04/01/2011
Certificate	--	Corresponding Wage	--
Employee	Paul Morrison		
Status Reason	Valid		

Completion

Completed	Yes	Degree [%]	100.00
Completed On	3/31/2011	Manager	Ethan Carter

"Name": Enter here, which specific review detail is described.

"Type": The user can choose from the following review detail types:

- **"Target"** or
- **"Evaluation"**.

"Certificate": If the review detail includes some form of certificate, it can be chosen here.

"Employee": Select which person the review detail belongs to.

"Status Reason": Select the status reason for each skill level record:

- **"Draft"**,
- **"Agreed"**,
- **"In Progress"** or
- **"Valid"**.

"Required Completion Date": Enter here when the review details is supposed to be completed.

"Performance Review": The performance review which the review detail is connected to can be chosen here.

"Corresponding wage": If the review detail is connected to a certain wage, it can be selected here.

"Completed": The user can select whether or not the review detail was accomplished. They can either select:

- **"Yes"**,
- **"Partially"** or
- **"No"**.

"Degree [%]: If **"Partially"** was selected in the **"Completed"** field, the user may enter the degree of completion here. If **"Yes"** or **"No"** was selected, the field is write-protected and automatically filled with **"0.00"** (Yes) or **"100.00"** (No).

"Completed On": The day when the review detail was completed.

"Manager": The manager who confirms that the review detail was completed.

4.3.7.2 Form "Skill Levels"

Please see chapter 4.3.5 for details.



4.3.8 Medical Records

Active Medical Records

Name	Employee	Last Exam	Next Exam
Medical record for office staff	Paul Morrison	4/1/2011	4/2/2012
Medical record for office staff	William Jones	4/1/2010	3/31/2011
Medical record for office staff	Daniel Brown	3/12/2011	3/12/2012
Medical record for office staff	Ethan Carter	3/3/2011	3/3/2012
Medical record for office staff	Hailey Miller	3/15/2011	3/15/2012
Medical record for office staff	Robert Bonderman	3/9/2011	3/9/2012
Medical record for office staff	Tom Seel	3/11/2011	3/11/2012

Overdue Medical Records by Business Unit

1

Honag Haw...
Department(Employee)

Overdue Health Checks by Business Unit

Click on the chart to perform Drill Down

Medical record for office staff

General

Name	Medical record for office staff	HR Representative	Hailey Miller
Employee	Paul Morrison		

Examination

Last Exam	4/1/2011	Next Exam	4/2/2012
-----------	----------	-----------	----------

As default chart, "**Overdue Medical Records by Business Unit**" is displayed in the Outlook start screen of this entity. A column chart shows how many medical records for employees are overdue, sorted by business unit.

MEDICAL RECORD : INFORMATION

Medical record for office staff

General

Name *	Medical record for office staff	HR Representative *	Hailey Miller
Employee	Paul Morrison		

Examination

Last Exam	4/1/2011	Next Exam	4/2/2012
-----------	----------	-----------	----------

"Name": Enter here, which specific health check is described.

"Employee": Select which person received the health check.

"HR Representative": The HR representative is the owner of the record.

"Last Exam": The day when the last health check took place.

"Next Exam": The day when the next health check is scheduled to take place.



4.4 Employee Services

For a more convenient working, we've added the "Employee Cockpit" and the "Fast Time Entry" to the "**Employee Services**" section of "**xRM1 HR Management**".

This section also makes it easy for you to organize employee absences. Submitted absences will be directly taken into account when availability is being calculated in "**CRM-Project**".

"xRM1 HR Management" is fully integrated in Microsoft Dynamics activity management.

Manage employees travel and related expenses. You can submit and track all kinds of expenses; receipts can be added to track individual costs.

4.4.1 Absences

The screenshot shows the Microsoft Dynamics CRM interface for the 'Absences' entity. The top navigation bar includes 'File', 'Absences', 'View', 'Charts', 'Add', and 'Customize'. Below the navigation bar is a toolbar with various icons for actions like New, Edit, Delete, Share, Assign, and Run Workflow. The main area displays a grid titled 'My Absences' with columns for Name, Reason for Absence, Owner, From, and Until. Two entries are listed: 'Leave - Hailey Miller' and 'New Annual Leave - Hailey Miller'. To the right of the grid is a chart titled 'Absences per Month' showing a single bar for June 2011 with a value of 3.00. A sidebar on the left lists 'Favorites' (Inbox, Sent Items, Deleted Items) and 'Dynamics HR' sections (Workplace, Sales, Marketing, Projects, Human Resources, Employee Services). The 'Employee Services' section is expanded, showing 'Absences' (Travels, Receipts, Employee Cockpit, Fast Time Entry), Ideas, Service, and Settings. At the bottom, there are links for Mail, Dynamics HR, Calendar, Contacts, and Tasks.

As default chart, "**Absences per month**" is displayed in the Outlook start screen of this entity. A column chart shows how many employees (in terms of days) are/were absent in which month.

4.4.1.1 General description

This menu option provides you direct access to the absence administration of each individual employee. Here you can create requests for leave as well as compensatory time-off.



Microsoft Dynamics CRM New Absence

Hailey Miller
Honag

SAVE SAVE & CLOSE NEW EDIT PROCESS FORM EDITOR

ABSENCE : INFORMATION

New Absence

Submitting Of Absence ► Substitute Confirmation ► Supervisor Approval ► HR Departmental Approval ► Leave Preparation ► Return Follow-Up ► Next Stage

General		Activities for Leave	Status of Processing
Applicant & Delegate		NOTES	
<input checked="" type="checkbox"/> Hailey Miller Substitute <input type="text"/>		No records founds.	Name -- Created On -- Status Reason <input checked="" type="checkbox"/> Created Role <input checked="" type="checkbox"/> Employee
General		Description	
From *	--		
Until	6/2/2011 11:59 PM		
Days *	--		
Reason for Absence *	Leave		
Remaining days of leave +	9.00		
Status Reason	Created		

Requests for leave are used to schedule employee absences. Compensational time-off is credited as "compensation days" to an employee's holiday entitlement. Compensational leave can occur for the following reasons, for example:

- When an employee has cut a vacation short (for work reasons),
- A vacation that has been approved cannot be taken for operational reasons or
- The employee has accumulated a certain amount of overtime which is being given back to them in vacation days.

Requests for leave and compensational time-off are supported through a multi-layer approval process, using Microsoft Dynamics workflows and activities. These workflows can be configured to the rules of your organization, in the Processes area of Microsoft Dynamics settings. In the standard configuration, the following major process steps are included, in particular:

- Substitute selection when creating a request,
- Substitution process whereby the user selected approves/accepts their role as substitute,
- Supervisor (manager) vacation approval,
- HR approval and vacation system entry.

After the vacation substitute has been confirmed, approved by superior/manager and by HR, the vacation days are automatically deducted from the employee's remaining days of leave, or added, in the case of compensational time-off.

Employees responsible for certain roles, such as "Manager" and "Head of HR", are defined in the user settings.

Note: When you're requesting leave for less than a day, the time away from work must be entered. For example: for a standard 8:00am to 4:00pm (16:00) work day, a half vacation day (in the morning) will be entered as 8:00am to 12:00pm.

4.4.1.2 Business Process Flow

ABSENCE : INFORMATION

New Absence

Submitting Of Absence (Active) ► Substitute Confirmation ► Supervisor Approval ► HR Departmental Approval ► Leave Preparation ► Return Follow-Up ► Next Stage

From *	click to enter	Days *	click to enter
✓ Until *	6/2/2011 11:59 PM		
Substitute *	click to enter		

A default business process flow for absences was created. It includes the following stages and fields:

"Submitting of Absence"

- "From",
- "Until",
- "Substitute",
- "Days" and
- "Reason for Absence".

**"Substitute Confirmation":**

- **"Substitution confirmed".**

"Superior Approval":

- **"Request approved".**

"HR Departmental Approval":

- **"Request approved".**

"Leave Preparation":

- **"Preparation completed".**

"Return Follow-up":

- **"Follow-up completed".**

Note: Fields can be added specifically just to the process flow. In addition, they can be on the form as well as on the process flow. If this is the case, entering or changing data in a field will apply for the form and the process flow.

4.4.2 Travels

The screenshot shows the Dynamics CRM Outlook start screen for the 'Travels' entity. The left navigation pane includes sections for Favorites, Hailey.Miller@honag.com, Dynamics HR (with 'Travels' selected), and Mail. The main area features a list of 'Active Travels' and a bar chart titled 'Travels by Business Unit'. The chart data is as follows:

Business Unit(Owner)	CountAll (Travel)
Honag US Consulting	1
Honag Schweiz Training AG	1
Honag Hawaii Training Limited	1
Honag Deutschland Consulting	2

Below the chart, a detailed view of a travel record is displayed:

iOne CRM Implementation New York - iOne corporation Inc. - New York - 05/02/2011 - 05/03/2011

General

Field	Value
Title	iOne CRM Implementation New York - iOne corporation Inc. - New York - 05/02/2011 - 05/03/2011
Account	iOne Corporation
Owner	Paul Morrison
Travel From	5/2/2011 6:00 PM
Travel Until	5/3/2011 9:00 PM
Project	iOne CRM Implementation New York
Travel Number	TRV0004
Department	

Address

Field	Value
Destination	Customer Address
Street	Fifth Avenue and 57th Street
ZIP/Postal Code	NY 10022
City	New York

Costs

Field	Value
Travel Times (MD)	0.00000
Travel Costs	\$0.00
Receipt Costs	\$0.00

As default chart, "**Travels by Business Unit**" is displayed in the Outlook start screen of this entity. A bar chart shows the amount of travels, sorted by business unit.



Microsoft Dynamics CRM iOne CRM Imple... | ?

+ NEW DEACTIVATE DELETE ASSIGN SHARE ...

TRAVEL : INFORMATION

iOne CRM Implementation New York - iOne corporation Inc. - New York...

General

General

Title	iOne CRM Implementation New York - iOne corporation Inc. - New York - 05/02/2011 - 05/03/2011			Project *	iOne CRM Implementation New York	
Account *	iOne Corporation	Travel From *	5/2/2011 6:00 PM	Travel Num:	TRV0004	
Owner *	Paul Morrison	Travel Until *	5/3/2011 9:00 PM	Department	--	

Address

Destination Customer Address

Costs

Travel Times (MD)	0.00000	Travel Costs	\$0.00	Receipt Costs	\$0.00
-------------------	---------	--------------	--------	---------------	--------

Billing

Billable	--	Currency	US Dollar	Timesheet	--	Cleared Amount	--
----------	----	----------	-----------	-----------	----	----------------	----

Description & Notes

NOTES

Enter a note

No Notes found.

Status Reason	Processing	Billed	No
---------------	------------	--------	----

New travel can be created within the Microsoft Dynamics menu or within a project node. When creating a travel within a project node, the "**Project**" field is automatically prefilled by the system.

- The "**Title**" is automatically filled in and contains the project name, destination and travel period.
- "**Owner**" is the employee taking the business trip. This is filled in with the current user.
- The "**Account**" field specifies which customer will be visited on the trip and is automatically filled in with the account from the respective project.
- "**Department**" is available if more detail is needed.
- The "**Travel Number**" is used as a unique identifier for the trip and associated receipts.
- "**Project**" shows the relevant project.
- "**Travel From**" and "**Travel Until**" is used to specify the time period of the entire trip.
- "**Primary customer address**" or "**Different address**" specifies whether the destination is the customer address or a different address (such as a construction site or a regional office). When a different address is needed, additional fields are displayed to specify "**Street**", "**ZIP code**", "**Town/City**" and "**Additional address**".

The fields in the "**Costs**" area are automatically filled in by the system, as soon as receipts or times are entered for the trip.

The tab on the left-hand side of the travel screen (as in the project) allows the user to create activities as well as view all completed activities. The activities stored here, are seen as 'travel times', as they are assigned to a trip. Therefore, the specific arrival and departure of an appointment should be assigned to the trip and not to the project.

Conversely, specific service appointments related to a project should not be associated with the trip but with the relevant project (e.g. "**Appointment**" or "**Service Activity**"). When creating these activities, use the "**Associated Travel**" field (under the Travel Management tab) to specify the travel associated with the appointment. The "**Regarding Appointment**" and "**Regarding Service Activity**" menu options allow you to view travel appointments and service activities. Solution settings can be used to plan travel activities (arrival, departure, preparations, and bookings, etc.) as well as times and costs. You can decide if travel times and expenses are tallied just for the trip, or are passed on to the project.

Receipts are totaled in the trip in the "**Costs**" field, as soon as the receipt is closed. These costs are always passed on to the costs of the project.

Note: Functionalities marked with an * are only available in combination with "**CRM-Project**" or an "**xRM1 HR Manager**" License.



4.4.3 Receipts

As default chart, "**Receipts by billability**" is displayed in the Outlook start screen of this entity. A pie chart shows the total value of receipts, sorted by billability.

In the standard, receipts are always associated with travel. However, you can also create receipts without travel.

There are various receipt types within the **Type of receipt document** field to choose from:

- Entertainment expenses
- Office supplies
- Bus/train
- Company car
- Flight
- Gifts
- Fuel
- Rental car
- Parking fees
- Private
- Other receipt document types
- Private vehicle
- Other car expenses
- Expenses
- Taxi
- Telephone
- Overnight stay

Various fields for entering receipt information are displayed at different times depending on the receipt type.

Relevant net costs are used for travel/project costs. For the "**Company Car**" receipt type, standard system costs are taken from the resource (e.g. Car) once the travel distance has been entered.



Microsoft Dynamics CRM | PROJECTS | Receipts | iOne CRM review O... | Create | Hailey Miller Honag | ?

+ NEW | DEACTIVATE | DELETE | ASSIGN | SHARE | ...

RECEIPT : INFORMATION

iOne CRM review Overnight Stay 03.05.2011

General

General

Title	iOne CRM review Overnight Stay 03.05.2011		
Travel	iOne CRM Implementation New York - iOne corporation Inc. - New York - 05/02/2011 - 05/03/2011		
Project	iOne CRM Implementation New York	Receipt Num.	VOU0008
Owner *	Paul Morrison	Date of Re.	5/3/2011
Travel Day	5/3/2011	Type of the *	Overnight Stay
		Paid By	Company
		Type of Paym	Visa

Vehicle

Mileage at	--	Mileage at	--
------------	----	------------	----

Cost

Gross Amou	\$220.00	Deductible	\$20.00	Net Amount	\$200.00
------------	----------	------------	---------	------------	----------

Billing

Billable	--	Is Billed	No	Currency	US Dollar
				Timeshee	--
				Cleared A	--

Status Reason Processing

To create a new receipt, simply follow the steps below:

- A receipt for a particular trip is assigned with the "**Travel**" field. When creating a travel receipt, the value is automatically taken from the trip. This also applies to the "**Project**" field.
- "**Type of receipt document**" provides you with a variety of field options. For example, selecting "**Company Car**" hides the "**Costs**" field from view; fields for selecting a vehicle and specifying the miles driven are displayed. Selecting "**Expenses**" reveals a tab which is linked to an (internet) expenses calculator.
- "**Receipt number**" is filled in automatically.
- Select "**Type of payment**" (not available for every receipt).
- Select "**Method of payment**" (not available for every receipt).
- Select "**Travel day**".
- Select "**Receipt day**".
- Select "**Gross Amount**".
- Select "**Deductible taxes**".
- "**Net Amount**" is calculated automatically.
- Select "**Vehicle**" if receipt type "**Company Car**" is selected.
- For receipt type "**Company Car**": The mileage is calculated automatically from the travel beginning and end. The calculated value can be overwritten.
- The "**Description**" field allows you to add additional information, for any further clarification.
- The "**Expenses calculator**" tab is only available when "**Expenses**" is selected as the receipt type.

Receipts are bound to the travel once deactivated.

Note: For most receipts, the Net Amount field is used as the starting field for calculating cost. However, the company car is an exception. Costs for the company car are taken from "**Costs per unit**" in the facility/equipment selected and multiplied by the value in the "**Distance traveled**" field.

Tip: Alternatively, receipts can also be entered centrally (e.g. by the back office). To do this, display the receipts at the required places within the pane. This enables those responsible to enter all receipts, and to directly assign those employees in question, such as for further classification or assignment to travel or a project.

4.4.4 Employee Cockpit

For the time entry functionalities of the Employee Cockpit, please see chapter 5.2.



Besides these time entry functionalities, the Employee Cockpit offers several views and charts for employees to get an overview about their performance reviews and targets, absences and personal receipts. In order to use them, please use the view "**Employee Self-Services**" in the dropdown section.

The screenshot shows the Microsoft Dynamics CRM interface with the 'Employee Cockpit' selected. It displays several views:

- My coming Absences:** A table showing 3 days from June 12, 2011, to June 14, 2011, with a status reason of 'Leave' and a substitute named 'Patricia Anderson'.
- Leave and remaining Leave:** A bar chart comparing 'Annual Leave (MD)' (red) and 'Remaining Leave (MD)' (green) for 'Hailey Miller'. The chart shows approximately 20 days of annual leave and 5 days of remaining leave.
- My open Targets:** A table listing a single target: 'Reorganize personnel files', which is partially completed at 60% by May 1, 2011, with a performance review date of May 2, 2010.
- My Performance Reviews last 5 years:** A column chart showing completion percentages over five years. The chart shows 100% completion for the year 2010.
- My Receipts:** A table listing a receipt for 'Printing paper' dated June 1, 2011, with a gross amount of 11.9, deductable taxes of 1.9, and net amount of 10.

"My coming Absences": Overview of the employee's coming leaves.

"Leave vs. Remaining Leave": This column chart compares the annual to the remaining leave entitlement.

"My open Targets": Overview of the employee's open targets which were agreed in performance reviews.

"My Performance Reviews last 5 years": This column chart shows how many percent of the employee's targets have been completed (totally or partially) or not in the last five years.

"My Receipts": Overview of the employee's personal receipts.

4.4.5 Fast Time Entry

The screenshot shows the Microsoft Dynamics CRM interface with the 'Fast Time Entry' module selected. It displays a list of work entries:

Date	Start Time	End Time	Work [h]	Type	Regarding	Subject
5/30/2011	11:00 AM	7:30 PM	8.5	Account	Honag Inc	Workshop about Labor Law
-			8.5			
5/31/2011	11:00 AM	6:00 PM	7	Account	Honag Inc	Workshop about Labor Law
-			7			
6/1/2011	10:30 AM	2:00 PM	3.5	Account	Honag Inc	Prepare wages
6/1/2011	3:00 PM	6:00 PM	3	Account	Honag Inc	Check Time Tracking
-			6.5			

The left sidebar shows navigation links for Favorites, Dynamics HR, and Mail.

Please see chapter 5.1 for details.

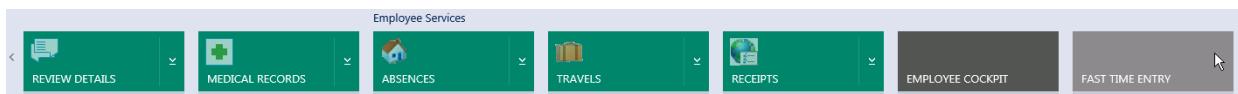


5 Time entry functionalities

The following functionalities can be found in the ribbon bar. In terms of content, they belong to the "**Employee Services**" section.

5.1 Fast Time Entry

The "**Fast Time Entry**" mask helps to make employee time entry even easier. The fast time entry mask is located on the ribbon bar, in almost every Microsoft Dynamics screen. The time entry mask can be made available as a direct link, for those users who don't have a Microsoft Dynamics license (e.g. "**ESS CAL**" user).



The mask allows you to edit completed work in one screen; you can add start/end times, assign work to other entities (projects, cases, leads, orders, etc.) or add activity descriptions. Once you are finished, you can then add the next activity.

Date	Start Time	End Time	Work [h]	Type	Regarding	Subject
6/2/2011	6:47 PM	6:47 PM	0			
Type : Project						
Case	7:00 AM	7:30 PM	8.5	Account	Honag Inc	Workshop about Labor Law
Lead			8.5			
Opportunity	7:00 AM	6:00 PM	7	Account	Honag Inc	Workshop about Labor Law
Order			7			
Invoice	7:00 AM	2:00 PM	3.5	Account	Honag Inc	Prepare wages
Account			3			
Contact	7:00 AM	6:00 PM	6.5	Account	Honag Inc	Check Time Tracking
Campaign						

The top menu of the Fast Time Entry is used for creating new entries.

- **"Current time"**: Sets all dates and time values to the current time.
- **"Filter"**: Select whether or not recently used entities or all entities are listed in the project list.
- **"View"**: Filter which displays entries for the selected time period: Yesterday, today, this week or last week.
- **"Name"**: Displays the user currently logged on. This user will also be designated for creating any appointments.
- **"Date"**: Date entered.
- **"Start time"**: Start of the entry.
- **"End time"**: End of the entry (changes automatically if the work duration changes).
- **"Work [h]"**: The work time of the entry (is automatically filled with start and end time).
- **"Subject"**: The description of the time entry.
- **"Type"**: List of entities available for time entries.
- **"Regarding"**: List of the records available for employee entries, for selected entity types.
- **"ETC"**: Estimated Time of Completion: Here you can register any work that still needs to be completed.
- **"Save"**: Saves the activity as complete.

All time entry mask entries are (as a default) stored as appointments in Microsoft Dynamics and therefore, are also available in the Outlook calendar.

However, the Fast Time Entry *records* are synchronized systematically. This allows you to configure Outlook filters specific for Fast Time Entry records, thus preventing the time recording entries appearing in Outlook.

Entries are grouped per day. The work volume total is displayed every day, to help you control which employee entries have been completed and which not..

Listed activities can be subtracted or edited by the user.

5/31/2011	9:00 AM	9:30 AM	0.5	iOne CRM Phase Concept	iOne CRM define concept	X	+
-----------	---------	---------	-----	------------------------	-------------------------	---	---

However, changes will no longer be possible for already settled entries.



5.2 Entering Time with the Employee Cockpit mask

With the user friendly and flexible Employee Cockpit mask, you can enter and edit your work hours quickly and easily. It can be accessed in almost all areas of Microsoft Dynamics, from the menu bar. The Employee Cockpit mask can also be used from outside Microsoft Dynamics (integrated into your intranet page, Outlook start page, SharePoint site etc.)

The screenshot shows the Microsoft Dynamics Employee Cockpit interface. At the top, there is a ribbon with tabs: REVIEW DETAILS, MEDICAL RECORDS, ABSENCES, TRAVELS, RECEIPTS, EMPLOYEE COCKPIT (which is selected), and FAST TIME ENTRY. Below the ribbon is a toolbar with various icons for New Activity, Import Data, Advanced Find, Tools, Help, Employee Cockpit, Fast Time Entry, and Projects.

The main area is titled "Employee Cockpit". It features a grid of time entries with columns for Start Date, Actual Duration, and Regarding. The grid shows entries for June 1, 2011 (3:00 PM - 03:00, Honag Inc), June 1, 2011 (10:30 AM - 03:30, Honag Inc), June 2, 2011 (10:30 AM - 04:30, Honag Inc), May 31, 2011 (11:00 AM - 07:00, Honag Inc), and May 30, 2011 (11:00 AM - 08:30, Honag Inc).

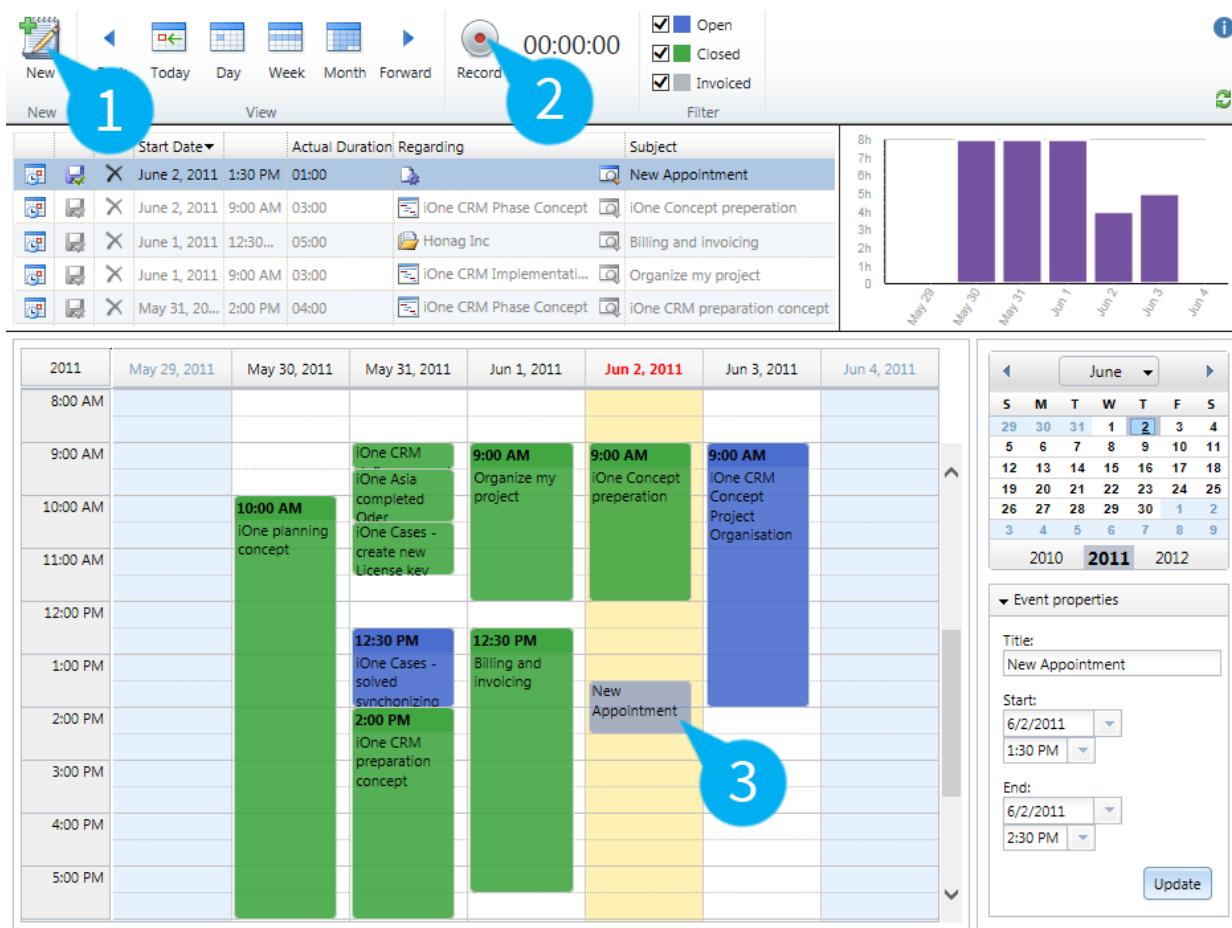
To the right of the grid is a bar chart showing duration by date. Below the grid is a calendar view for June 2011, with specific events highlighted in green and blue. An event for "11:00 am Workshop about Labor Law" is shown for June 1st, and another for "10:30 am Prepare wages" and "10:30 am HR Planning for Rest of the Year" on June 2nd.

The left sidebar contains a navigation tree under "Dynamics HR" with categories like Human Resources, Workplace, Sales, Marketing, Service, and Ideas. Under "Employee Services", "Employee Cockpit" is selected. Other options include Absences, Activities, Travels, and Receipts.

Please select the "**Employee Cockpit**" view in the dropdown area after starting the mask. After that, you can create and edit the time entries in three different ways:

1. Using the "New" button at the top
2. With a stopwatch
3. In the calendar view

The entered items will be immediately synchronized with the Microsoft Dynamics system and can be used for project reporting and controlling.



5.2.1 Time Entry with the “New” button

To create a new entry, click on the “**New**” button, located on the left hand side of the menu (1). A new time entry line will be created in the grid; the item also appears in the calendar view (3). Now, you are able to edit the start/end time and/or duration, create a new title, and (if necessary) add a short description. You can use the look-up button to select the “**Regarding**” item. After selecting the button, you can search for the appropriate ‘regarding record’ via the Microsoft Dynamics look-up mask.

To complete your time entry, click on the diskette icon in the second column of the grid. The time is now recorded and the line will be greyed out.

To view an item in Microsoft Dynamics, use the calendar icon in the first column.

To delete a record, click on the “**Delete**” icon in the third column.

5.2.2 Time Entry with the stopwatch

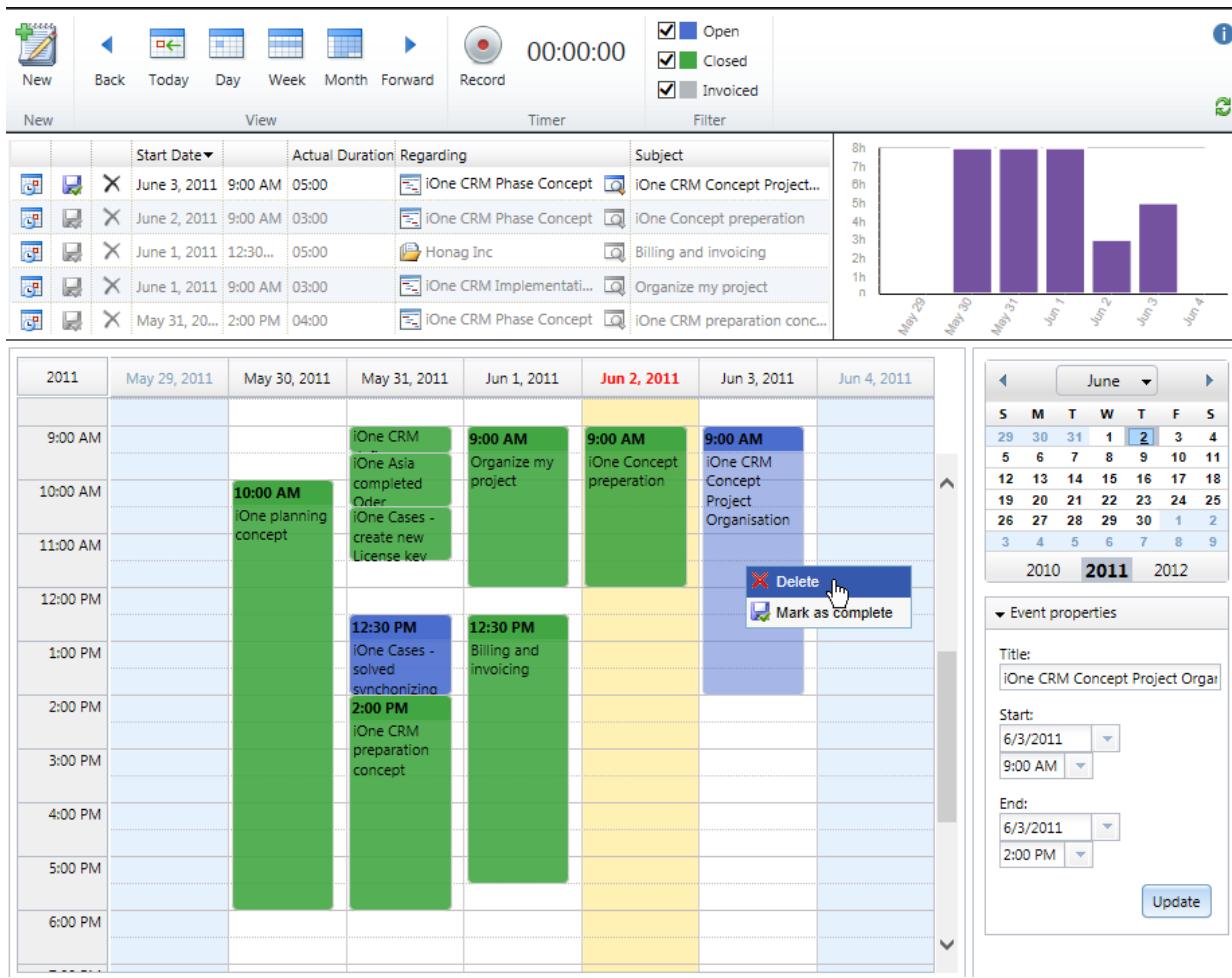
To track your current tasks, use the stopwatch or “Timer” in the upper menu (2).

To create a new entry, click on “Record”: the new item, and appropriate blue colored item, will be created in the grid. As with other time entries, you need to fill out the information related to the record. You can enter the information now or after you’ve stopped the timer. For recording, editing, or deleting the entry, use the options previously described.

5.2.3 Time Entry with the calendar view

To create a new entry in the calendar view (3), click once directly in the calendar: the new blue colored item will be created. Now you can edit the start/end time and/or duration by dragging and dropping the upper and lower boundaries of the item or moving them. Create a new title using the “**Event properties**” mask, on the right. To select the ‘regarding’ item, or for entering more details, you can use the grid view or open the record in Microsoft Dynamics by double clicking on the item in the calendar.

To complete your time entry, right-click on the created item and choose the “**Mark as completed**” option. The time is now recorded and the item color will change from blue to green. Choose the “**Delete**” option to delete the entry.



5.2.4 Graphical hours overview

A container displaying the hourly overview is available: a column chart shows the total number of hours entered for each day.

5.2.5 Navigation, views and filters

In the top bar, you will also find navigation and filtering functionalities. You can set and navigate between today, daily, weekly and monthly views, forwards and back. The filter for "open", "closed", and "invoiced" entries provides you with a more transparent and flexible view for creating and viewing your entries.

You can also use the calendar, on the right hand side, to navigate to a particular day.

5.2.6 Employee Cockpit Mask modification

The Employee Cockpit mask can be adjusted according to your individual needs:

- Elements and views can be rearranged or removed individually
- New elements (iFrames) can be added
- Columns in the table grid can be added, removed or rearranged

Be aware that the appropriate security role is required ("System Administrator" or "System Customizer").

5.2.6.1 Modifying grids and views

To customize the Employee Cockpit grids and views, go to "**Settings**" => "**Customizations**" => "**Customize the System**".

Find the "**xRM1 Employee Cockpit**" entity and click on the "**Employee Cockpit**" form.



The screenshot shows the Microsoft Dynamics CRM ribbon editor interface. The ribbon tabs include File, Home, Insert, and various form-related options like Save, Undo, Redo, Header, Footer, Navigation, Form Properties, Preview, Show Dependencies, Managed Properties, and Form. On the left, a navigation pane lists sections such as Employee Cockpit, Common, Sales, Service, Marketing, Processes, Workflows, and Dialog Sessions. The main workspace displays the 'Employee Cockpit' form under the 'xRM1 Employee Cockpit' solution. The form is divided into sections: Header, Employee Cockpit (containing Ribbon, Grid, and Calendar areas), General, and Footer. The 'Grid' area contains a chart titled 'Chart Total Hours'. The 'Footer' area includes a 'Status' section.

The three "**Ribbon**", "**Grid**" and "**Calendar**" areas are now displayed. They correspond to the relevant areas in the "**Employee Cockpit**" mask. You can replace or remove the elements by using standard Microsoft Dynamics customizing functions. To change the size of an area, click on the applicable element, go to the tab "**Formatting**" and then to "**Row Layout**". Change the amount of rows and (as a result) the size of the element will also increase or decrease.



Field Properties
Modify this field's properties.

Display Formatting Details Events

Layout
Select the number of columns the control occupies:

One column

Two columns

Three columns

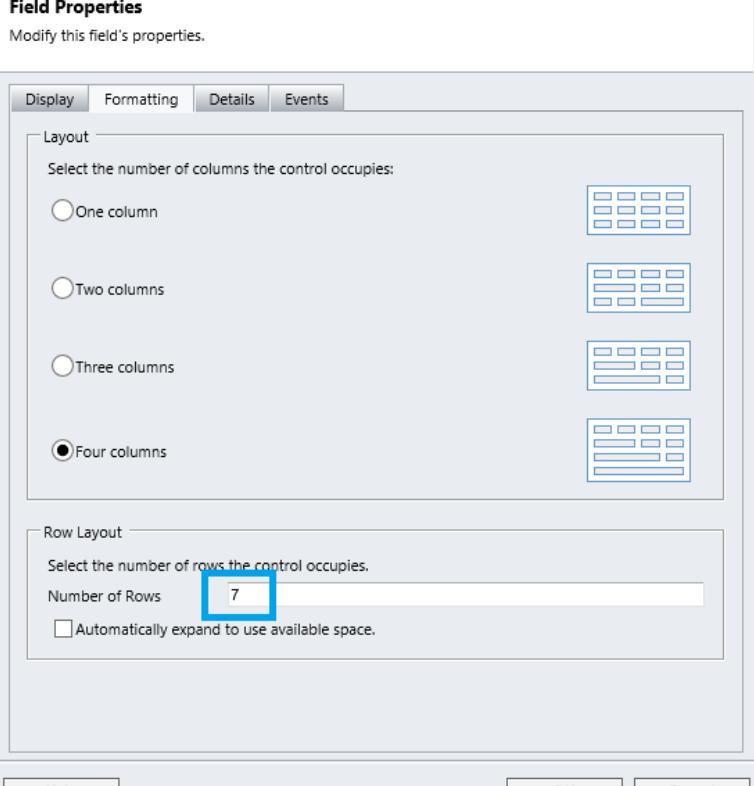
Four columns

Row Layout
Select the number of rows the control occupies.

Number of Rows 7

Automatically expand to use available space.

Help OK Cancel



5.2.6.2 Add new elements

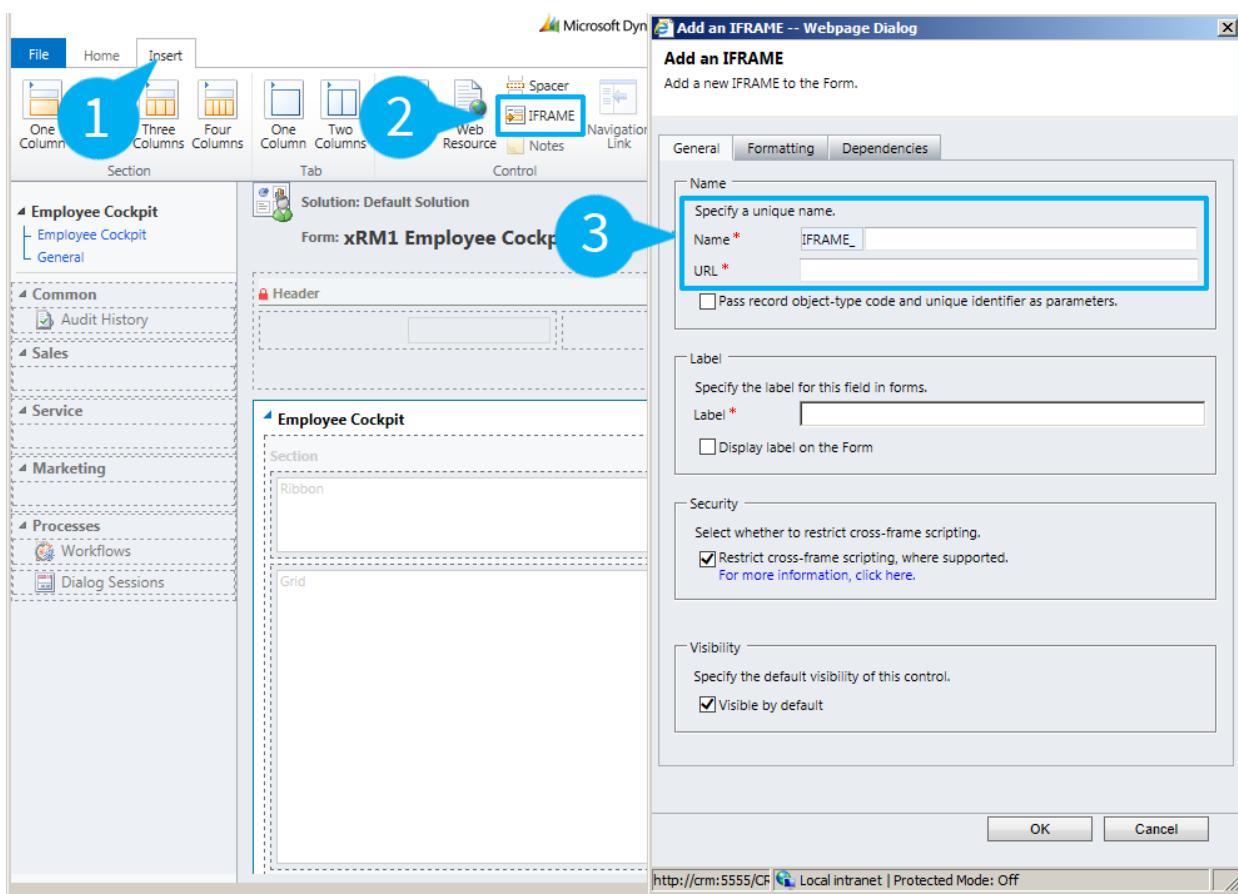
You can also add additional elements (iFrames) to the Employee Cockpit. To do this, use the "**Insert**" tab in the "**Employee Cockpit**" form.

You need to know the parameters of the iFrame, such as the iFrame-name and URL.

For example, you can add the CRM-Project Work Schedule (if you have the appropriate license) as a new iFrame. Use the following parameters:

IFRAME:_:xrm1_work_schedule

URL: http://crm:5555/CRM/WebResources/itarapro_/web/PersonalWorkSchedule.html?userid=1033



After saving and publishing, you can see the following result:



The screenshot displays three main views of the xRM1 HR Management application:

- Activity Grid:** Shows a list of activities with columns for Start Date, Actual Duration, Regarding, Subject, and Description. Activities include "BLI DB Sub CRM Realisation", "Leave from 6/3/2011 to 6/3...", "iOne CRM Phase Concept", and "iOne Concept preparation".
- Calendar Grid:** A detailed calendar view for June 2011, showing daily tasks and events. Key entries include "10:00 AM iOne planning concept", "12:30 PM iOne Cases - solved synchronizing", "2:00 PM iOne CRM preparation concept", "9:00 AM Organize my project", and "9:00 AM iOne Concept preparation".
- Employee Cockpit Grid:** A grid for employee Paul Morrison, spanning from June 2 to June 18, 2011. It shows a weekly schedule with tasks like "iOne CRM Implement" and "iOne CRM Phase Concept". A tooltip for "iOne CRM Phase Concept" indicates it's a service activity.

5.2.6.3 Add, remove or rearrange columns in the table grid

You can also rearrange, add or remove the columns in the table grid:

	Start date	Start time	End time	Duration	Regarding	Title	Description
	June 3, 2011	9:00 AM	2:00 PM	05:00	iOne CRM Phase Concept	iOne CRM Concept Project Organ...	
	June 2, 2011	1:30 PM	2:30 PM	01:00	License expired	Create new License	
	June 2, 2011	9:00 AM	12:00 PM	03:00	iOne CRM Phase Concept	iOne Concept preparation	
	June 1, 2011	12:30 PM	5:30 PM	05:00	Honag Inc	Billing and invoicing	

To do this, go to "**Settings**" => "**Customizations**" => "**Customize the System**" => "**Activity**" => "**Views**" => "**Inactive Public Views**" and then select the "**xRM1 Employee Cockpit Grid**". Now you can add, remove or rearrange the columns through standard Microsoft customizing functions.

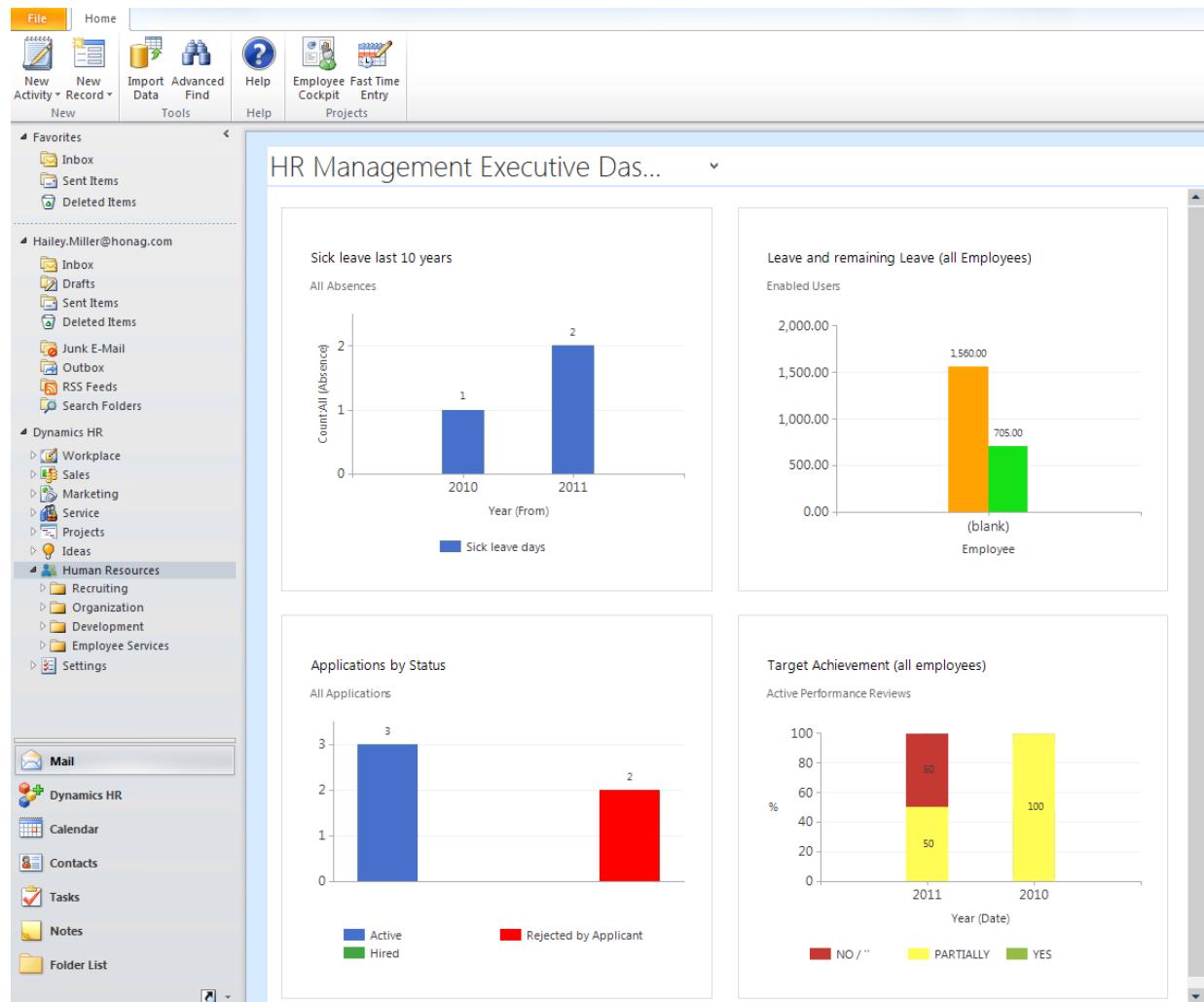


6 My Work – HR Management Controlling

6.1 Dashboards

"**xRM1 HR Management**" offers dashboards for HR managers and employees.

6.1.1 HR Management Executive Dashboard

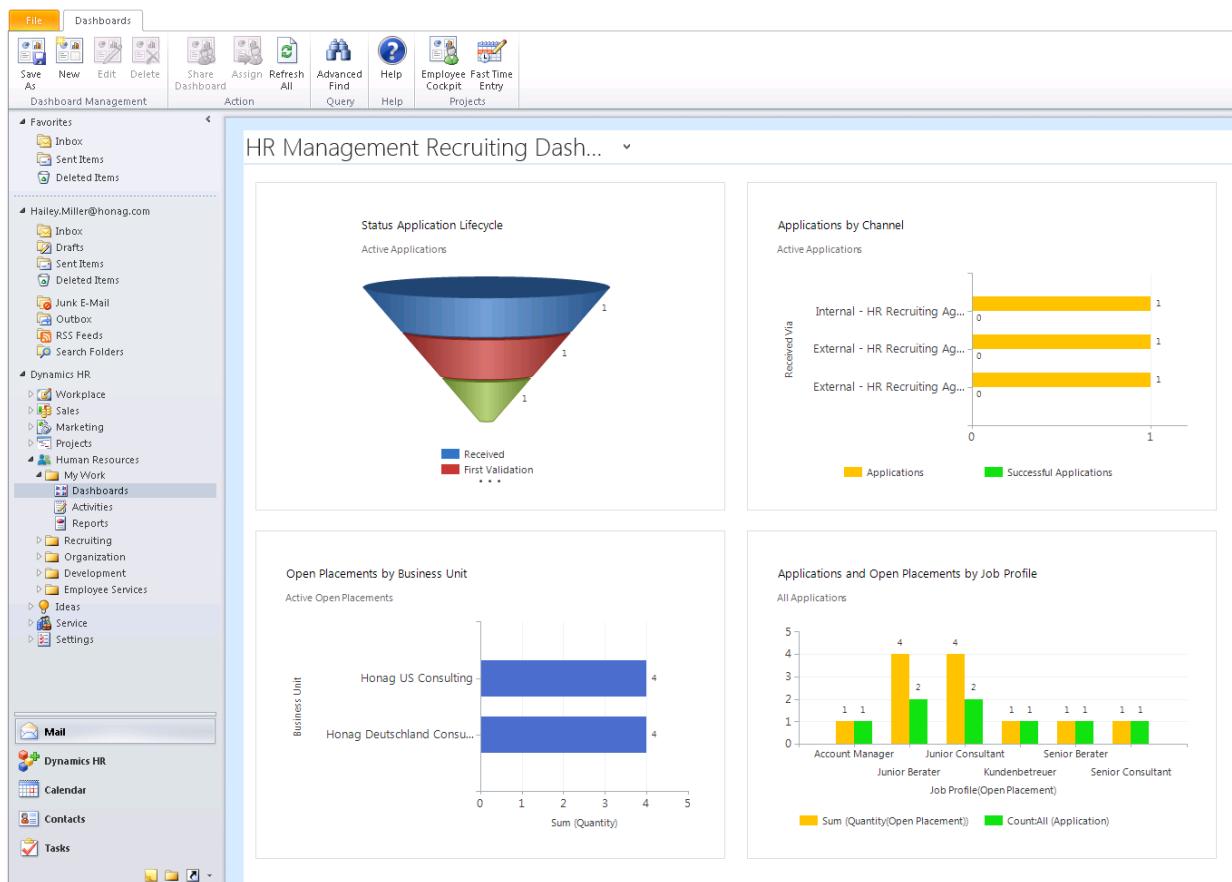


The most important parameters for HR Executives can be seen at a glance. This dashboard includes the following charts:

- **"Sick leave last 10 years"**: This chart adds up the total amount of days considered as sick leave over the last ten years.
- **"Leave and remaining Leave (all employees)"**: Comparison of leave and remaining leave for all employees.
- **"Applications by Status"**: Overview of the applications, sorted by status.
- **"Target Achievements (all employees)"**: This chart shows how many percent of all employees' targets have been completed (totally or partially) or not.



6.1.2 HR Management Recruiting Dashboard

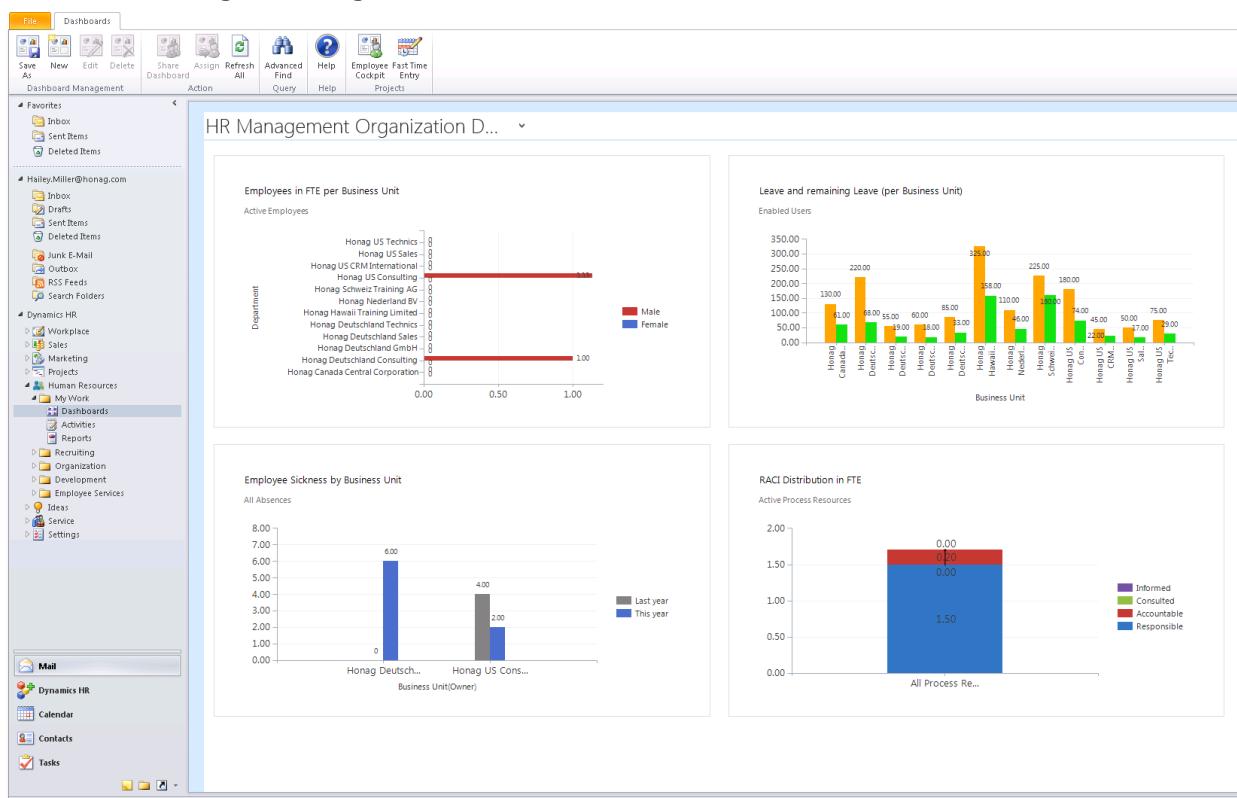


The dashboard for HR recruiting includes the following charts:

- **"Status Application Lifecycle"**: This funnel chart gives an overview of the amount of applications in each status reason.
- **"Applications by Channel"**: Total amount of applications and successful applications for each recruiting channel.
- **"Open Placements by Business Unit"**: Amount of open placements, sorted by business unit.
- **"Applications and Open Placements by Job Profile"**: This chart compares the number of open placements per job profile to the respective applications.



6.1.3 HR Management Organization Dashboard

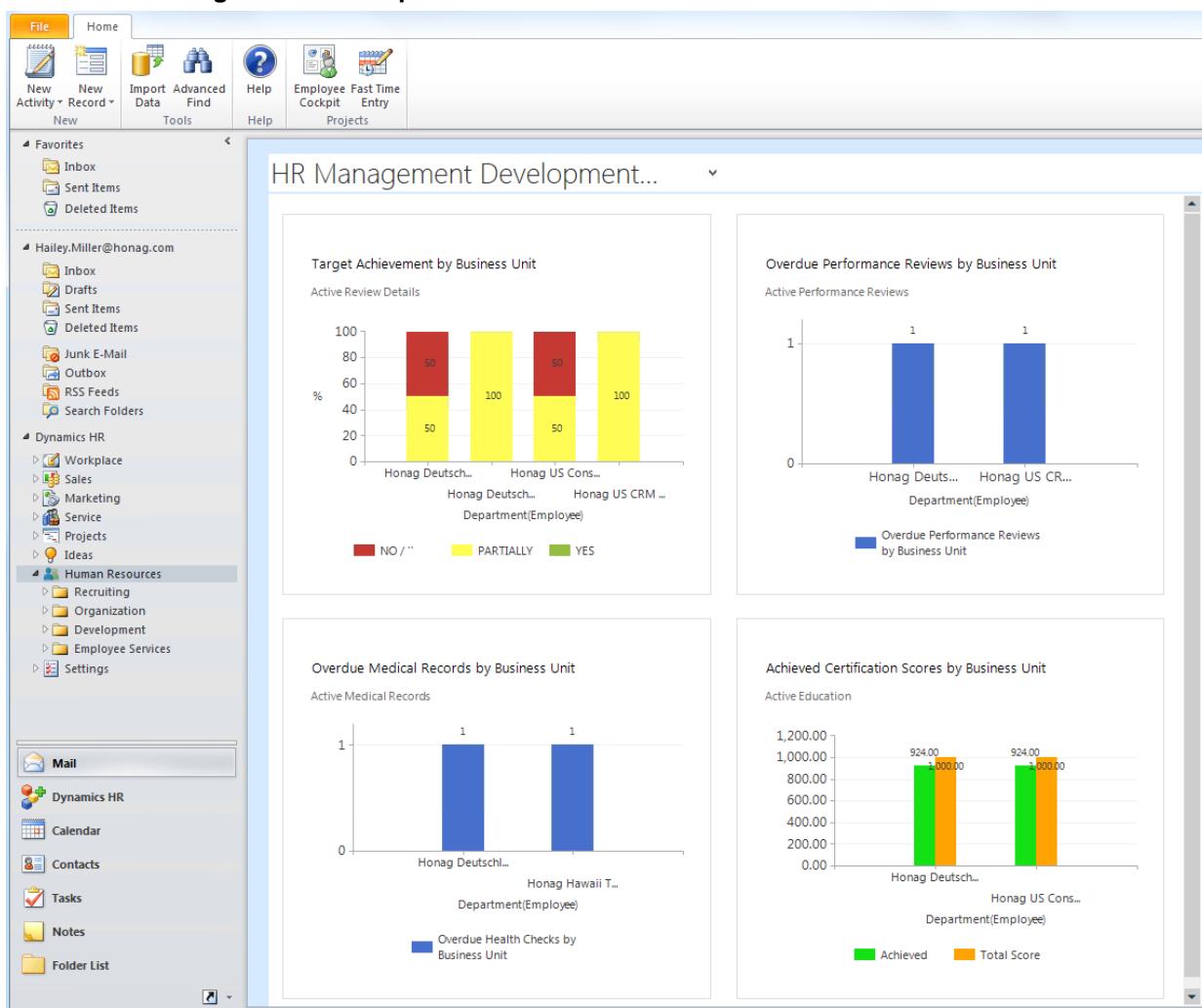


The most important parameters concerning HR Organization can be seen at a glance. This dashboard includes the following charts:

- **"Employees in FTE per Business Unit"**: This chart adds up the amount of assigned FTE, sorted by business unit.
- **"Leave and remaining Leave (per Business Unit)"**: Comparison of leave and remaining leave, sorted by business unit,
- **"Employee Sickness by Business Unit"**: Overview of sick leave days, sorted by business unit
- **"RACI Distribution in FTE"**: This chart shows how many FTE are assigned to which RACI role.



6.1.4 HR Management Development Dashboard



The dashboard for HR development includes the following charts:

- **"Target Achievement by Business Unit":** This chart shows how many percent of the targets of a business unit have been completed (totally or partially) or not.
- **"Overdue Performance Reviews by Business Unit":** Overview, how many performance reviews for employees are overdue, sorted by business unit.
- **"Overdue Medical Records by Business Unit":** This chart shows how many medical records for employees are overdue, sorted by business unit.
- **"Achieved Certification Scores by Business Unit":** The user can get an impression, how many points of how many total points were achieved at in education exams and certificates, sorted by business unit.



6.1.5 HR Management Employee Services Dashboard

The screenshot shows the HR Management Employee Services Dashboard. It features a navigation bar at the top with options like File, Dashboards, Save, New, Edit, Delete, Share, Advanced Find, Help, Employee Fast Time Entry, and Projects. The main area is titled "HR Management Employee Servi...". It contains four main sections:

- My Activities:** A grid showing various activities: Appointment (Telephone interview - David Day - Junior Consulting), Phone Call (Postponement of telephone interview - David Day - Junior Consulting), Appointment (New Appointment), Task (CRM: Check application for leave and approve it), and Trigger (Recruiting).
- Leave and remaining Leave:** A bar chart comparing available leave (20.00) and remaining leave (9.00) for Hailey Miller.
- My coming Absences:** A list of upcoming absences from 6/12/2011 to 6/14/2011, all marked as Leave, with Patrisha Anderson as the substitute.
- My Substitutions:** A list of substitute assignments from 7/3/2011 to 7/7/2011, all marked as Leave, with Patrisha Anderson as the owner.

This dashboard displays charts and lists concerning relevant HR features for each employee:

- **"My Activities":** Overview of the employee's activities.
- **"Leave and remaining Leave":** Comparison of the employee's leave and remaining leave.
- **"My coming Absences":** The employee's upcoming absences.
- **"My Substitutions":** List of dates when the employee is a substitute for a colleague.
- **"Internal open Placements":** List of open placements which have been published internally.
- **"My Target Achievements":** This chart shows how many percent of the employee's targets have been completed (totally or partially) or not.

6.2 Activities

The screenshot shows the Activities dashboard. It has a similar structure to the HR Management Employee Services dashboard, with sections for My Activities, Leave and remaining Leave, My coming Absences, and My Substitutions. The activities listed are identical to those in the previous screenshot.

As default chart, **"Activities by month"** is displayed in the Outlook start screen of this entity. A column chart shows the activities per month, sorted by status reason.

Below you will see an overview of all available activities:



- Task
- Fax
- Phone Call
- Email
- Letter
- Appointment
- Service Activity
- Campaign Response
- Campaign Activity
- Recurring Appointment
- Material Usage
- Rendered Service
- Resource Usage
- Trigger

Depending on the user's security roles, he/she may use Microsoft Dynamics standard activities. In case "**CRM-Project**" is available, the user may also use "**Material Use**", "**Rendered Service**" and "**Resource Usage**".



6.3 Human Resource Report

[Edit Filter](#)

calculate since: [Calendar](#) [View Report](#)

1 of 1 | 100% | Find | Next | [Print](#) | [Reset](#)

Human Resource

Employee: Paul Morrison	Title: Project Manager	Costs/h: \$90.00	Telephone:	E-Mail: Paul.Morrison@honag.com
HR Manager: Hailey Miller	Manager: Ethan Carter	Leave Manager: Ethan Carter	Site: New York - USA	Business Unit: Honag US Consulting

Leave Overview [MD]	total:	20.00
	leave requested:	2
	taken since selected date:	
	approved:	
	remaining leave:	7.00
Absence [MD]		2
Project time reported [h]	internal	external
Task	7.00	3.00
Appointment	7.00	5.50
E-Mail	0.00	0.00
Letter	0.00	0.00
Fax	0.00	0.00
Telephone	0.00	7.00
Service	0.00	3.00
Rendered Service	0.00	0.00
Total	23.00	27.50

Effective 6/3/2011 7:00:27 PM Prepared by Paul Morrison page 1 of 1

The "**Human Resource**" report offers an overview of an employees' HR base data, his/her leave and absences, as well as reported project time.

The date from which the report data should be displayed, can be selected in the "**Calculate since**" field.

The HR base data consist of the following fields:

"Employee": The employee for whom the report was selected.

"Title": The employee's job title.

"Costs/h": The employee's hourly rate.

"Telephone": The employee's phone number.

"E-Mail": The employee's e-mail address.

"HR Manager": The HR representative responsible for the employee.

"Manager": The employee's direct supervisor.

"Leave Manager": The person who approves the employee's absences/leave.



"Site": The site of the employee's business unit.

"Business Unit": The employee's business unit.

In the "**Leave overview [MD]**" and "**Absence**" section, the following fields are displayed:

"Total": The total amount of the employee's vacation days.

"Leave requested": Number of vacation days the employee has requested.

"Taken since selected date": Amount of vacation days the employee has taken since the selected day.

"Remaining Leave": Number of vacation days remaining.

"Absence [MD]": The employee's number of absence days.

Finally, the internal and external "Project time reported [h]" will be displayed for the following activities:

- **"Task"**,
- **"Appointment"**,
- **"E-Mail"**,
- **"Letter"**,
- **"Fax"**,
- **"Telephone"**,
- **"Service"** and
- **"Rendered Service"**.



7 Rights and roles concept

7.1 Default settings

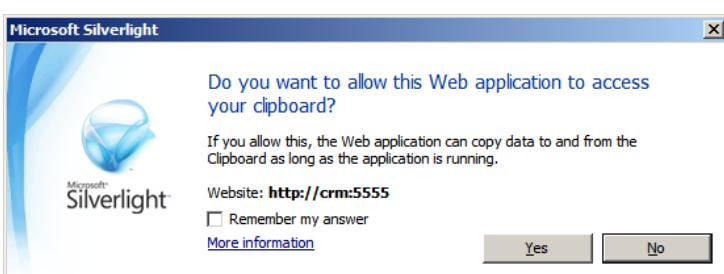
7.1.1 Licensing

You can enter and save your license in the license field. This field can be found under "**Configuration**", when selecting the relevant solution under "**Settings**" --> "**Solutions**".

For creating a license, your Microsoft Dynamics Organization Unique Name is required. Your MS Organization Unique Name is determined automatically and is displayed directly on the configuration screen. With the integrated copy function the name, as well as other license relevant data (company name and e-mail), can be readout and forwarded.

The screenshot shows the Microsoft Dynamics Configuration interface for the 'xRM1 Rollup 12' solution. The left sidebar lists various configuration categories like Information, Configuration, Components, Entities, etc. The 'Configuration' category is selected. The main pane displays the 'Configuration of xRM1' screen. Under the 'Licensing' section, there is a 'License key' area with a 'License upload' button and a status message 'Valid license data uploaded'. Below it are links for 'Purchase License' and 'Contact xRM1 Support'. The 'License report and request' section contains fields for 'Company Name *' (with a placeholder 'CRM'), 'E-Mail' (placeholder 'CRM'), and 'Organizational Unique Name' (placeholder 'CRM'). A 'Copy' button is located next to the 'Organizational Unique Name' field.

In order to create your data for the license, please enter them in the respective fields under "**License report and request**" and press "**Copy**". Please confirm the copying by pressing "**Yes**", when you are prompted with the Silverlight window, as shown below.



Now, we ask that you paste your data ("**Strg**"+"**V**") into an editor or directly into an e-mail.

The data is saved as an XML string and appears as follows:

```
<LicenseInformation><CompanyName>Firma  
XY</CompanyName><EMail>firmaxy@email.com</EMail><OrgUniqueName>CRM</OrgUniqueName></LicenseInformation>
```

Please do not modify the record, but rather send it directly to xRM1, along with information about the desired license types and their amounts, by using the license request form in the portal. Please refer to the website www.xRM1.com for license requests.

The license file will then be created and sent to you via e-mail. The license can be used right away, after you've uploaded it into the solution.



7.1.2 Global

The screenshot shows the Microsoft Dynamics CRM Configuration interface for the 'xRM1 Rollup 10' solution. The left sidebar lists various configuration categories: Information, Configuration (selected), Components, Entities, Option Sets, Client Extensions, Web Resources, Processes, Plug-in Assemblies, Sdk Message Processing S., Service Endpoints, Dashboards, Reports, Connection Roles, Article Templates, Contract Templates, E-mail Templates, Mail Merge Templates, Security Roles, and Field Security Profiles. The main panel is titled 'Configuration of xRM1' and contains sections for Licensing, Project Settings, Travel Management, and Global. Under Global, there are sections for Calculation (with a dropdown for 'Calculating users' set to 'Calling User'), Caching (with a 'Livetime [Min.]' input field set to 999), and Log Level (with checkboxes for Error (recommended), Trace, and Debug). A status bar at the bottom indicates 'Status: Existing'.

"Caching": Specify how long cashed user specific calendar availability should be valid for. The less often you change the calendar settings (e.g. user work hours), the more you can increase the values.

"Log Level": Specify the log level for the xRM1 solution. We recommend the "**Error**" setting.

7.2 Installation

Instructions on how to install the solution can be found in our "**Getting Started Guide**". You can download this from the xRM1 website. The guide can be found under "**Products**", "**xRM1 HR Management**", and "**Downloads**" (on the right hand side).

7.3 Solution activation (Activation Wizard)

Activating the solution can be done easily with the "**Activation Wizard**". This can be found on the ribbon bar under "**Settings**" → "**xRM1 License Types**".

The screenshot shows the 'Activation Wizard - Microsoft Internet Explorer provided by itara GmbH' welcome screen. It features a logo and the title 'Welcome to the Activation Wizard for your xRM1 Business Solution'. A descriptive text states: 'The activation wizard will guide you through the license activation process of your xRM1 Business Solutions. You can use the activated license functionality directly after completion.' Below this, it says: 'Optionally the wizard can create demo data or initialize standard default settings.' A note at the bottom encourages users to 'Click Next to continue.' At the bottom right are 'Next' and 'Cancel' buttons. A footer message reads: 'For any issues and questions, please don't hesitate to contact our [xRM1 Support](#)'.

You will begin by being asked whether you would like to activate a test version, temporary or purchased license.



Activation Wizard - Microsoft Internet Explorer provided by itara GmbH

License activation for xRM1 Business Solutions (Page 1 of 5)

Activation options:

- I would like to begin with a free trial (without license, valid 14 days beginning with import)
- I would like to use a temporary License
- I would like to upload a license

For any issues and questions, please don't hesitate to contact our [xRM1 Support](#)

Back Next Cancel

7.3.1 Activating a free trial

Here, you choose the solution(s) which you would like to be activated, by checking the applicable boxes.

Activation Wizard - Windows Internet Explorer

Selecting your xRM1 Business Solution(s) (Page 2 of 5)

Which solution(s) would you like to activate for testing?

CRM-Project

- CRM-Project Employee
- CRM-Project Standard Billing and Invoicing
- CRM-Project Standard Resource Management
- CRM-Project Professional
- CRM-Project Enterprise

Idea Management

- Idea Management Employee
- Idea Management Professional

Time Tracking

- Time Tracking Employee
- Time Tracking Professional

HR Management

- HR Management Employee
- HR Management Supervisor
- HR Management Manager

For any issues and questions, please don't hesitate to contact our support. [xRM1 Support](#)

Back Next Cancel

100%

In the next step you have the option to create default settings and base data. Please select the applicable boxes.



Activation Wizard - Microsoft Internet Explorer provided by itara GmbH

Default settings and demo data (optional) (Page 3 of 5)

The wizard can initialize default settings and create demo data.
We recommend this especially for trials.

Please take note that the default settings are required, for the proper use of each xRM1 Business Solution.

The activation wizard completes this process for you.

Create default settings (recommended for trial)
This will automatically initialize the configuration of your solutions (like number ranges, labeling, etc.)
Existing settings remain unchanged
[xRM1 Settings](#)

Create demo data (recommended for trial)
This will automatically create demo data (like products, price lists, services, etc.)
[xRM1 Demo](#)

Alternatively, you can enter the settings manually. You can find the settings under CRM=> Settings => Customize => Solutions => The_4th_Module / xRM1 => Configuration

For any issues and questions, please don't hesitate to contact our [xRM1 Support](#)

[Back](#) [Next](#) [Cancel](#)

We recommend applying the default settings in the instance you are running a test version or when you would like to quickly and productively start your xRM1 business solution. For advanced use, additional configurations are recommended. The following data will be created:

Setting	Default	Description
Hours per Man Day [h]	8	Select the number of work hours, per work day, of a full-time employee.
Number of recently used regarding entities	5	Specify how many recently used items to list in the Fast Time Entry
How long Time Entry can be edited [h]	24	The length of time in which corrections can be made to Fast Time Entries.
Current project number	0000001	Number sequence for automatic project numbering.
Project number prefix	PRO	Prefix for automatic project numbering
Travel time/travel expenses added to the project	Active	This setting specifies whether associated trips, travel times, and related travel expenses should be added to a project or not.
Current travel number	0000001	Number sequence for automatic travel numbering.
Travel number prefix	TRV	Prefix for automatic travel numbering.
Current receipt number	0000001	Number sequence for automatic receipt numbering.
Receipt number prefix	VOU	Prefix for automatic receipt numbering.
Cache	500	Length of time in which cached user-specific calendar availability should be valid for.
Log level	Error	Here, the log level is set.



The activation can subsequently start.

The Activation Wizard - Microsoft Internet Explorer provided by itara GmbH

Finish activation
(Page 4 of 5)

The wizard now has all the necessary information. To process the selected options, please click Finish.

Please note that this may take several minutes.

For any issues and questions, please don't hesitate to contact our [xRM1 Support](#)

Back Finish Cancel

After the activation has finished, the following message will appear.

The Activation Wizard - Microsoft Internet Explorer provided by itara GmbH

Finish activation
(Page 5 of 5)

Modifications of settings done.
Creating demo data done.
Submitting license data done.
Managing solution done.

Configuration completed.

For any issues and questions, please don't hesitate to contact our [xRM1 Support](#)

Close

7.3.2 Activating temporary or purchased license(s)

When you select the option to activate a temporary or permanent license, a window will appear where you will be able to upload the license.

The Activation Wizard - Windows Internet Explorer

xRM1 Business Solutions license file upload
(Page 2 of 5)

License upload

How do I get a license?

For any issues and questions, please don't hesitate to contact our [xRM1 Support](#)

Back Next Cancel

Selecting the corresponding button will prompt an Internet Explorer window to open, allowing you to select your saved license data.



Activation Wizard - Windows Internet Explorer

xRM1 Business Solutions license file upload (Page 2 of 5)

License upload

Open

Administrator Downloads

Name Date modified Type

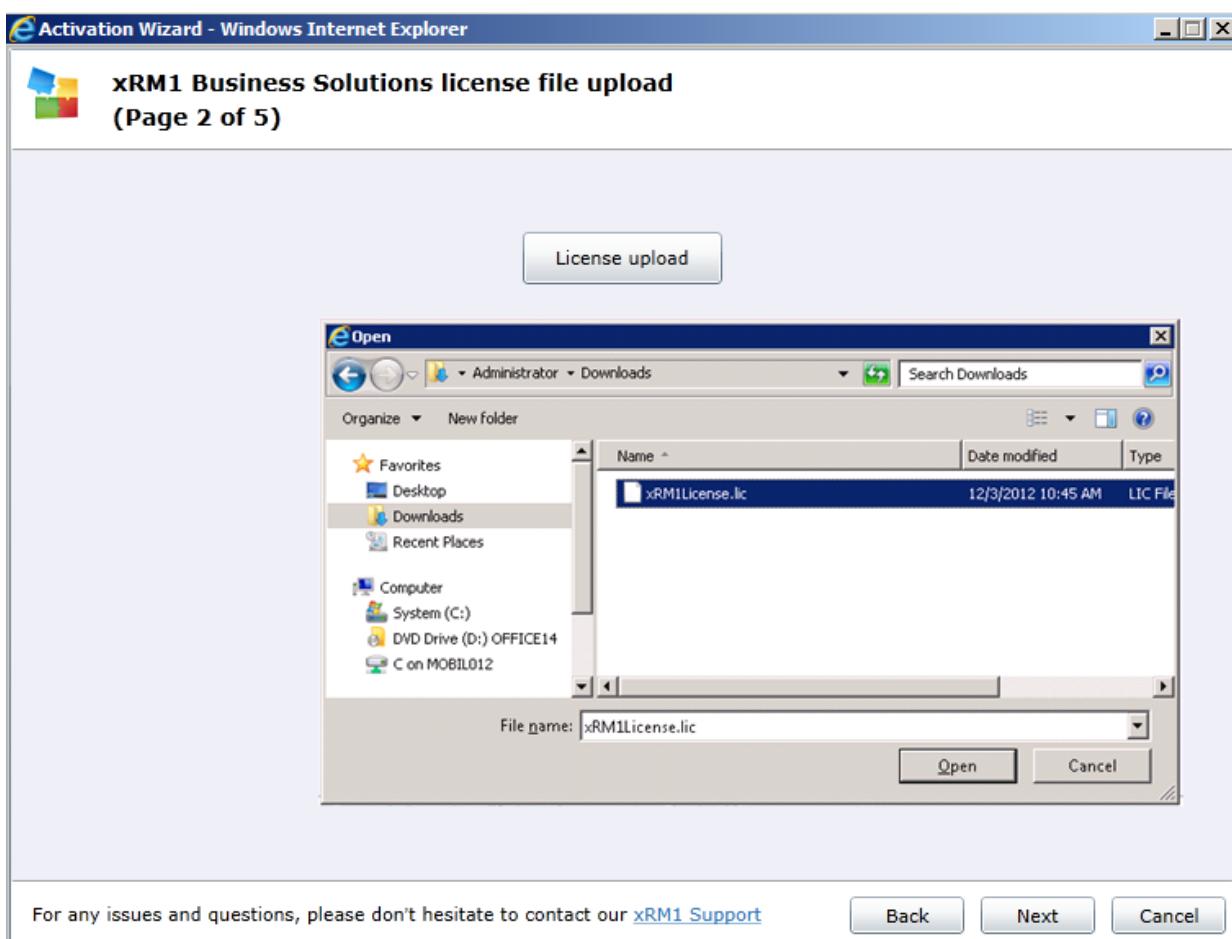
xRM1License.lic 12/3/2012 10:45 AM LIC File

File name: xRM1License.lic

Open Cancel

For any issues and questions, please don't hesitate to contact our [xRM1 Support](#)

Back Next Cancel



After selecting "**Open**", the data will be uploaded and a message will appear indicating whether you have uploaded a valid or expired license.

Activation Wizard - Windows Internet Explorer

xRM1 Business Solutions license file upload (Page 2 of 5)

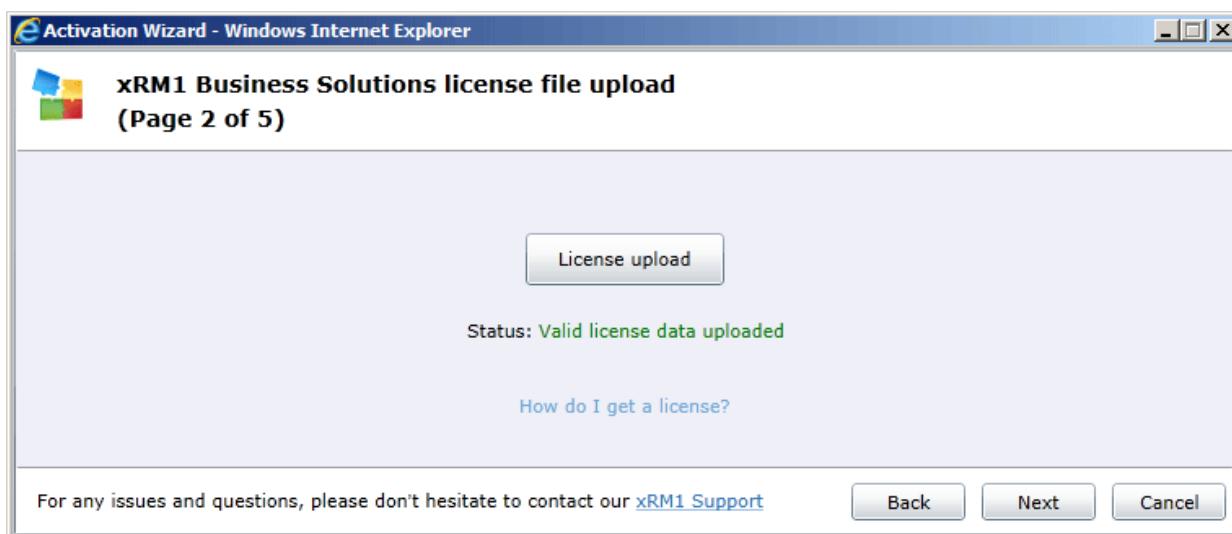
License upload

Status: **Valid license data uploaded**

How do I get a license?

For any issues and questions, please don't hesitate to contact our [xRM1 Support](#)

Back Next Cancel



The next few steps are identical with steps 3 to 5, with free test licenses. Next, select whether you would like to implement standard settings and/or basic data/demo data. This will subsequently help to activate the license as well as complete the activation.

You can also request and upload your license through the xRM1 Configuration window. For more information, please see chapter 7.1.1.

7.4 Solution configuration (Configuration Wizard)

The Configuration Wizard is a part of the Activation Wizard but can be run separately. This can be the case when basic data/demo data or settings will be created at later point in time.

Note: Using the "**Configuration Wizard**" will not override any already existing data.



Welcome to the Configuration Wizard for your xRM1 Business Solution

This Wizard supports the configuration of your xRM1 Business Solution. The wizard helps you preset the settings of your system with common values. As an option, this wizard additionally creates demo data in your system.

Please click next to proceed.

For any issues and questions, please don't hesitate to contact our [xRM1 Support](#)

Next **Cancel**

Here you have the option to select whether you would like to activate a free test version, a temporary or a permanent license. Instead, one begins directly with selecting basic settings and/or base data.

Default settings and demo data (optional)
(Page 1 of 3)

The wizard can initialize default settings and create demo data.
We recommend this especially for trials.

Please take note that the default settings are required, for the proper use of each xRM1 Business Solution.

The activation wizard completes this process for you.

Create default settings (recommended for trial)
This will automatically initialize the configuration of your solutions (like number ranges, labeling, etc.)
Existing settings remain unchanged
[xRM1 Settings](#)

Create demo data (recommended for trial)
This will automatically create demo data (like products, price lists, services, etc.)
[xRM1 Demo](#)

Alternatively, you can enter the settings manually. You can find the settings under CRM=> Settings => Customize => Solutions => The_4th_Module / xRM1 => Configuration

For any issues and questions, please don't hesitate to contact our [xRM1 Support](#)

Back **Next** **Cancel**

Then, confirm the selected configuration.

Finish configuration
(Step 2 of 3)

To finish the configuration of your selected options, click on configure now.

Please note that this might take several minutes.

For any issues and questions, please don't hesitate to contact our [xRM1 Support](#)

Back **Finish** **Cancel**



After the configuration is complete, the following window will appear:



7.5 License management

For "**xRM1 HR Management**", every user needs to have a valid license; this can be customized in each Microsoft Dynamics user. Assigning a license, the user gets the following security roles according to the following chart:

	xRM1 HR Management License Type			
Security Role	Staff	Employee	Supervisor	HR Manager
xRM1 HR Employee		X	X	X
xRM1 HR Supervisor			X	X
xRM1 HR Manager				X

7.6 Roles concept

"**xRM1 HR Management**" uses the standard rights and roles concept of Microsoft Dynamics. The settings in the roles are used as basic settings and can be configured further to the specific requirements of your organization. Please refer to the Microsoft Dynamics standard customization documentation for detailed information on configuring security roles.

The screenshot shows the 'xRM1 HR Management' application window. The top navigation bar includes 'File', 'Home', 'New', 'Record', 'Import Data', 'Advanced Find', 'Help', 'Employee Fast Time', 'Cockpit', 'Entry Projects'. The left sidebar has sections for Favorites (Inbox, Sent Items, Deleted Items), Dynamics HR (Workplace, Sales, Marketing, Service, Projects, Ideas, Human Resources, Recruiting, Organization, Development, Employee Services), Settings (Business, System, Administration, Data Management, System Jobs, Document Management, Auditing, Customization, Process Center, Extensions), and Mail (Dynamics HR, Calendar, Contacts, Tasks, Notes, Folder List). The main content area is titled 'All Roles' and lists various roles with their names and business units. The 'xRM1 HR Employee', 'xRM1 HR Manager', and 'xRM1 HR Supervisor' roles are highlighted in blue.

Name	Business Unit
Scheduler	Honag US CRM International
System Administrator	Honag US CRM International
System Customizer	Honag US CRM International
Vice President of Marketing	Honag US CRM International
Vice President of Sales	Honag US CRM International
xRM1 HR Employee	Honag US CRM International
xRM1 HR Manager	Honag US CRM International
xRM1 HR Supervisor	Honag US CRM International
xRM1 Idea Concept Developer	Honag US CRM International
xRM1 Idea Decision Maker	Honag US CRM International
xRM1 Idea Discusser	Honag US CRM International
xRM1 Idea Evaluator	Honag US CRM International
xRM1 Idea Evaluator Restricted	Honag US CRM International
xRM1 Idea Implementer	Honag US CRM International
xRM1 Idea Manager	Honag US CRM International
xRM1 Idea Reviewer	Honag US CRM International
xRM1 Idea Rewarder	Honag US CRM International
xRM1 Idea Submitter	Honag US CRM International
xRM1 Idea Validator	Honag US CRM International
xRM1 Time Tracking Employee	Honag US CRM International
xRM1 Time Tracking Professional	Honag US CRM International

7.7 xRM1 HR Management security roles

The following roles are available in the delivered configuration:

7.7.1 xRM1 HR Employee

All users who want to use employee services, expense tracking and see their personal development need this security role. It is included in all license types.

7.7.2 xRM1 HR Supervisor

To be able to authorize leave and performance reviews, you need this security role. It's included in the license types "**xRM1 HR Supervisor**" and "**xRM1 HR Manager**".

7.7.3 xRM1 HR Manager

This role is necessary for full functionality. It is only included in the license type "**xRM1 HR Manager**".

7.8 License types and license assignment

Under "**Settings** → "**xRM1 License types**", you will find an overview of the existing license types as well as their corresponding validity dates.



File xRM1 License Types View Charts Customize

Chart Pane New Chart Edit Chart Save As Import Chart Export Chart Refresh Chart Assign Share Collaborate Layout

Favorites

- Inbox
- Sent Items
- Deleted Items

Dynamics HR

- Workplace
- Sales
- Marketing
- Service
- Projects
- Ideas
- Human Resources
 - Recruiting
 - Organization
 - Development
 - Employee Services
- Settings
 - Business
 - System
 - Customization
 - Process Center
- Extensions
 - Competences
 - Product-Service Assignments
 - Idea Types
 - Absence Administration
 - xRM1 License Assignments
 - xRM1 License Types**
 - Rewards
 - Areas
 - Product Area Tax Keys
 - Tax Keys
 - Tax Values
 - Project Journal

Chart

Active xRM1 License Types

Name	Licensed Amount	Expiration Date
HR Management Employee	100	9/30/2011
Time Tracking Professional	100	9/30/2011
HR Management Manager	100	9/30/2011
CRM-Project Standard Resource Management	100	9/30/2011
Idea Management Employee	100	9/30/2011
CRM-Project Standard Billing and Invoicing	100	9/30/2011
CRM-Project Professional	100	9/30/2011
CRM-Project Enterprise	100	9/30/2011
CRM-Project Employee	100	9/30/2011
Idea Management Professional	100	9/30/2011
Time Tracking Employee	100	9/30/2011
HR Management Supervisor	100	9/30/2011

Active xRM1 License Types

Count

Expiration Date

Sep 2011

License Type	Count
CRM-Project Employee	100
CRM-Project Enterprise	100
CRM-Project Professional	100
CRM-Project Standard Billing and...	100
CRM-Project Standard Resource Ma...	100
HR Management Employee	100
HR Management Manager	100
HR Management Supervisor	100
Idea Management Employee	100
Idea Management Professional	100
Time Tracking Employee	100
Time Tracking Professional	100



Under "**Settings**" → "**xRM1 License Assignments**", you can find a list of the current license assignments.

The screenshot shows the Dynamics 365 ribbon interface. The 'File' tab is selected. The 'xRM1 License Assignments' tab is active. Other tabs include View, Charts, Customize, and various system-related tabs. The left navigation pane shows the 'Dynamics HR' section, specifically the 'License Assignments' node under 'Extensions'. The main area displays a grid titled 'xRM1 License Assignments' with columns for License Type, License User, Name, and Status. A bar chart on the right visualizes license usage across different resource types.

License Type	License User	Name	Status
CRM-Project Enterprise	Peter Moore	License Assignment	Active
CRM-Project Enterprise	Olivia Martin	License Assignment	Active
CRM-Project Enterprise	Stan Dixon	License Assignment	Active
CRM-Project Enterprise	Daniel Brown	License Assignment	Active
CRM-Project Enterprise	Tanja Abel	License Assignment	Active
CRM-Project Enterprise	Antje Kaas	License Assignment	Active
CRM-Project Enterprise	Hailey Miller	License Assignment	Active
CRM-Project Enterprise	James Moore	License Assignment	Active
CRM-Project Enterprise	William Jones	License Assignment	Active
CRM-Project Enterprise	Marc Jones	License Assignment	Active
CRM-Project Enterprise	Sven Denk	License Assignment	Active
CRM-Project Enterprise	Patrisha Anderson	License Assignment	Active
CRM-Project Enterprise	Hendrik Csallner	License Assignment	Active
CRM-Project Enterprise	David van Veen	License Assignment	Active
CRM-Project Enterprise	Simon Conrad	License Assignment	Active
CRM-Project Enterprise	Linda Smith	License Assignment	Active
CRM-Project Enterprise	Natalie King	License Assignment	Active
CRM-Project Enterprise	Steven Clark	License Assignment	Active
CRM-Project Enterprise	Peter Schneider	License Assignment	Active
CRM-Project Enterprise	Ethan Carter	License Assignment	Active
CRM-Project Enterprise	Patricia Adam	License Assignment	Active
CRM-Project Enterprise	Stijn van Campen	License Assignment	Active
CRM-Project Enterprise	Hans Dorsch	License Assignment	Active
CRM-Project Enterprise	Mia Green	License Assignment	Active
CRM-Project Enterprise	Peter Maurer	License Assignment	Active
CRM-Project Enterprise	Robert Bonderman	License Assignment	Active
CRM-Project Enterprise	Hannelore Mader	License Assignment	Active
CRM-Project Enterprise	Alexander Williams	License Assignment	Active
CRM-Project Enterprise	Thomas Klein	License Assignment	Active
CRM-Project Enterprise	Tom Seel	License Assignment	Active
CRM-Project Enterprise	Jörg Christ	License Assignment	Active
CRM-Project Enterprise	Logan Nelson	License Assignment	Active
CRM-Project Enterprise	Jacob Johnson	License Assignment	Active

In order to assign a license to a user, click on "**Settings**" → "**xRM1 License Assignments**" and then (in the ribbon bar) on "**New**". In the open window, select the "**License User**" and "**License type**" which this user should have.

For the option "**Assign Roles Automatically**", we recommend keeping the setting on "**Yes**", as the user receives all security roles of the assigned license automatically. After clicking "**Save & Close**", the user with the applicable license appears in the list of license assignments.

The screenshot shows the 'License Assignment' creation form. At the top, there are buttons for NEW, DEACTIVATE, DELETE, SHARE, EMAIL A LINK, and three dots. Below that is a title 'XRM1 LICENSE ASSIGNMENT : INFORMATION'. The main section is titled 'License Assignment'. Under 'General', it shows 'License User *' as Hailey Miller and 'License Type *' as HR Management Manager. There is also a checked checkbox for 'Assign Roles Automatic' with the value Yes. At the bottom, there is a status reason field set to Active.